Colour Forecasting: An Investigation into how its Development and Use Impacts on Accuracy

Julie King

A thesis submitted in partial fulfillment of the requirements for the degree of Doctor of Philosophy at London College of Fashion, University of the Arts

June 2011

Acknowledgements

I would like to thank the following for their contribution and support during the compilation of this research:

Professor Edward Newton for initial encouragement to undertake PhD study, and the significant mentoring role he has played.

Professor Sandy Black, whose supervision has always been good natured, encouraging and valued.

Dr Gerard Moran who has been supportive throughout my studies, understanding the balance I was always trying to achieve between work and research.

To my family who have endured my endless quest for knowledge with good humour and support, most of the time, particularly to Richard and Saffron.

Abstract

Colour forecasting is a sector of trend forecasting which is arguably the most important link in the product development process, yet little is known about it, the methodology behind its development or its accuracy. It is part of a global trend forecasting industry valued recently at $36bn, providing information which is developed commercially eighteen months to two years ahead of the season.

Used throughout the garment supply chain, by the yarn and fibre manufacturers, the fabric mills, garment designers and retailers, it plays a pivotal role in the fashion and textile industry, but appears in many different forms. Colour forecasts were first commercially produced in 1917, but became more widely used during the 1970s, and in recent years digital versions of colour forecasts have become increasingly popular. The investigation aimed to establish the historical background of the industry, mindful of the considerable changes to fashion manufacturing and retailing in recent decades. For the purposes of the investigation, a period spanning 25 years was selected, from 1985 to 2010. In reviewing the available literature, and the methodologies currently used in developing forecasting information, it became clear that there was a view that the process is very intuitive, and thus a lack of in depth academic literature. This necessitated a considerable quantity of primary research in order to fill the gaps in the knowledge regarding the development, use and accuracy of colour forecasting.

A mixed method approach to primary research was required to answer the aim of the thesis, namely to investigate how colour forecasts are compiled, and examine their use, influence and accuracy within the fashion and textiles industry, suggesting methods for developing more accurate forecasts in the future. Interviews were conducted with industry practitioners comprising forecasters, designers and retailers to better understand how colour was developed and used within industry. Two longitudinal studies were carried out with the two largest UK clothing retailers to map their development and use of colour palettes, and understand better how colour contributes to the critical path and supply chain. Two colour development meetings were observed, one with a commercial colour forecaster, the other with an industry association, and two colour archives were studied to establish whether or not any identifiable and predictable colour cycles existed.

Data from the interviews and longitudinal studies were analysed using a grounded approach, and revealed some new insights into the influences upon the development of colour forecasts both commercially and from the retailer's perspective. The sell through rates of merchandise, EPOS analysis and range of practices between those interviewed and the two retailers studied provided an interesting insight into working practices and how colour forecasting information is changed when used by the retailers. It was found

that a group of core colours existed, which were used season after season, and consistently demonstrated a high sell through rate, such as black, white, grey and navy.

In order to establish whether or not colour cycles were consistently predictable in their repetition, two colour forecasting archives were assessed. If predictable colour cycles existed, they would be a useful tool in developing more accurate forecasts. Unfortunately this was not the case, as no clear colour cycles were found. However, the archive, together with evidence from the retailers demonstrated the 'lifecycle' of fashion colours was longer than expected, as they took time to phase in and out.

It was concluded that in general the less fashion led brands used their own signature colours and were able to develop colour palettes far later in the product development timeline. This approach could be adopted more widely by retailers and designers as it was discovered that although accuracy rates for colour forecasts are generally accepted to be around 80%, the commercial forecasters provide colour update cards closer to the season where at least 40% of the colours are changed. Very early information, two years ahead of the season is no longer necessary in the contemporary fashion and textiles industry.

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1 Introduction

Trend forecasting is a vital part of the fashion and textiles industry, and the manner in which the predicted information is published and adopted by the global industry varies considerably. The majority of the major trend forecasters today publish trend forecasting books, which are segmented into various consumer markets, including womenswear, lingerie, menswear, childrenswear and sportswear, each demanding distinct information. A typical trend book comprises four or five key themes or stories, each with different sources of inspiration. Each theme is presented graphically with found images, specially photographed work, fashion sketches, fabric swatches and colour palettes. The visual information is supported by text outlining the background to the theme, and its origins, with explanatory text regarding specific garment shapes, fabric or yarn choices, and of course, colour selection. A colour palette in such a publication would usually comprise eight colours per theme, and these colours would apply to fabric, yarn, accessories and garment trims such as buttons, zips and other fastenings. For the purposes of the research, it is the colour palettes contained within the trend books which are of most significance, as they are usually the first elements required in the entire fashion and textile supply chain.

Little research has been carried out into the trend forecasting industry, substantially less on the specialist discipline of colour forecasting, yet it is a significant tool utilized by designers within a broad range of industries, encompassing fashion, accessories, textiles, interiors, cosmetics, automotive and product design. Consequently the study aims to contribute new knowledge to the sector using a considerable amount of primary research.

It investigates the processes and influences on decision making in the developmental stages within the colour forecasting industry, the similarities and differences between them, culminating in an analysis of how the information has been employed within the fashion and textile industry's supply chains and critical paths during the last twenty five years. All these factors will be considered to assess their impact on the accuracy of the data currently provided and how it might be improved. Trend forecasting, and more specifically colour forecasting is a very under-researched area with little published academically, as will be highlighted by the Literature Review. The overarching objective was to investigate how colour forecasts are compiled, the principles and methodologies behind their compilation, and their influence within the fashion and textile industry. Coupled to this were issues of how accurate colour predictions are, and how this was, or was not influenced through its development and application. The thesis analyses the industry practice and use of colour forecasts and suggests methods for developing more accurate forecasts in the future. One approach was identifying clear, repetitive and predictable colour cycles: could these be used in future to assist in the creation of more accurate colour trends?

In order to contextualise the industry further, additional investigation was required into the key forecasting industry players and the methodologies and information sources employed developing and predicting colour palettes years ahead of the fashion season. For the purposes of the research, the area of fashion and textiles, primarily within the UK, was selected for examination.

The scope of the study covered a twenty five year period between 1985 – 2010, although much evidence of colour and trend forecasting activity exists from before this date. However, the existing literature suggested that the 1980's was a decade of substantial growth for the industry with many new companies entering the business; it was also supported by one of the colour archives studied, The Promostyl archive held at London College of Fashion, which spanned a period from 1985 to 2005/06, and is vital in establishing colour cycles within the forecasts.

The thesis is structured in 9 Chapters: Chapter 3 covers the literature review, and Chapter 4 the historical background. The primary research is contained in Chapters 6, 7, 8 and 9 with further exploration of fashion and trend development theories and Chapters 5 and and also 8.

In Chapter 2 the research methodology is outlined, comprising a range of methods including two longitudinal surveys with UK retailers, observational techniques used in two colour trend development meetings, interviews with influential industry figures from the world of fashion retailing, design and forecasting, the examination of two commercial colour forecast archives and mapping the industry to ascertain the key players in the commercial world of colour trend forecasting. A grounded approach was used as the most applicable form of qualitative research to be employed throughout the investigation, useful when there is little or no prior knowledge of an area, as with colour forecasting.

In Chapter 3 a review of literature was conducted and revealed a lack of information dedicated to the business of colour forecasting, its accuracy and forecasting in general. There was evidence of increasing interest in the area as the study progressed with several newer publications being released in recent years on the subject of generic trend forecasting. It was surprising to find so little academic work on the area, as it is a sector which is of vital importance to the entire fashion and textiles supply chain, from the fibre, yarn and fabric manufacturers through to the retailers, valued in early 2011 at $36 billion.

Chapter 4 provides a historical overview of the development of the colour and trend forecasting industries, identifying the earliest known colour forecast, released in 1917 in the US, and precipitated by the First World War which effectively shut down the Parisian fashion industry and the information it supplied to the rest of the world. The chapter also charts the rise of several new forms of forecasting, including the online forecasting site

WGSN, established in 1997, the rise of mobile telephone apps and trend blog spots, where any informed commentator can easily and economically offer a view on fashion and colour trends to a potential audience of millions.

Following the historical overview is the examination of today's industry in Chapter 5. It examines different types of forecasters, their forecasting toolkits, methodologies, the role of colour forecasting and the impact which fast fashion has had on the forecasters. It also looks at traditional trend development theories to assess whether or not they are still valid.

Identifying the developmental methods of forecasters is covered in Chapter 6 where information gathering techniques are examined more closely through primary research, and the contribution of intuition is discussed within the creative process. Specific models for gathering and synthesizing information to develop fashion trends are examined, as are consumer influences and the associating of colours with specific eras or themes. Interviews with forecasters, designers and retailers form the basis of the primary research in establishing how the information is developed and used within the fashion and textiles sector. Two colour development meetings were also observed as a part of the primary research. These are documented and examined to identify any common practices within consensual colour committees which might have implications for the research. Questions include whether or not information sources are duplicated by forecasters, designers and colourists producing homogenous trends and the methodologies used when colour palettes are developed.

In Chapter 7 the longitudinal surveys are discussed, continuing the primary research, providing a clear insight into the fashion and textile industries' use of colour forecasting and assessing commonalities in areas such as working practices, colour information sources, colour palette development strategies and EPOS (Electronic Point of Sale) data.

Throughout the research, attention was paid to the rapidly changing global fashion and textile industry, particularly the evolution of fast fashion, the implications on the retailers critical path, the supply chain, and the rise of digital and online sources of information. Where colour forecasting fits within these areas is established, and implications for accuracy are again discussed to highlight who are the main users of the data, which sectors prefer to use their own forecasting information generated in-house, and why that may be so.

Following from this, the investigation into colour cycles and influences in colour progression in Chapter 8. Brannon's model of colour cycles is tested to see if it is still appropriate in today's contemporary fashion industry, and colours are categorised into long and short term fashion colours, and core colours, are explained. How fashion colours differentiate themselves from core colour groups is also discussed, as are repeated

cyclical colour combinations, which could form the basis, along with cyclical colours, for preparing more accurate forecasts.

Finally in Chapter 9 the notion of predictable cyclical colour trends is explored further, assessing two colour trend archives, one from leading French forecasters Promostyl, held at London College of Fashion and spanning over twenty years, the other a far smaller archive of French forecasters Nelly Rodi and Peclers held at De Montfort University. Comparisons are made between the forecasters, as they are three of the leading figures in the business today.

The conclusions of the research are discussed in Chapter 10, where potential future changes in the methods of colour forecasting are also outlined.

2 Research Methodology

2.1 Rationale

It was important to develop a clear research strategy, which Robson (1993) classifies in three areas:

- Experiment
- Survey
- Case study

He further argued that research may be classified according to purpose:

- Exploratory studies - literature reviews, interviews, and focus groups.
- Explanatory studies - studying situations to explain the relationship between variables.
- Descriptive studies -- to accurately represent people, events, situations, as a precursor to exploratory research.

Exploratory research is further defined by Phillips et al (2003) as the type of research used in tackling new issues about which very little is known. It may require the development of new theories, concepts or methodologies. Such an approach clearly resonated with the subject matter and the particular focus of the study, how colour forecasting information is compiled, its use, influence on the supply chain and critical path, and accuracy are areas which are yet to be fully explored in depth. In attempting to answer the research questions, the use of longitudinal case studies was key given the dearth of information available on the subject of colour forecasting. Further research included exploratory studies, a literature review, observation of colour compilation meetings, analysis of colour archives and interviews with key industry figures able to contextualise the subject. There was also a degree of both explanatory and descriptive studies through the longitudinal studies and forecasters mapping. A mixed method of research was adopted using both qualitative and quantitative research.

2.2 Research Design

In order to conduct the research it was essential to establish the parameters of the investigation, and identify key research questions These are set out in Fig. 2.1. along with the potential sources of information available to answer the questions and the techniques employed to gather the data. From those questions a plan of work was made according to

the parameters in Fig. 2.1. It was clear that it was essential to interview a range of individuals associated with the trend and colour forecasting industry, and establish the methodologies used to develop their predictions, and how it was subsequently used. Two longitudinal studies were established to investigate this, with two of the UK's leading clothing retailers, each operating in very different market areas with diverse requirements.

A series of interviews was conducted with forecasters, design managers and retailers to establish how forecasts were developed and used in a wider context, and observation of two colour trend development meetings supported the interview data, providing solid evidence of the decision making processes and the accuracy of those decisions.

The companies providing trend and colour forecasting information were also mapped to establish the scale of the industry, and the range of products on offer. Finally, two colour archives were examined to establish whether or not clear and regular colour cycles were a feature of colour forecasting, and compare predicted trends against the popular catwalk trends of the day. The range of primary research was designed to support the aims and objectives of the thesis and to provide a rich variety of data from which clear results could be gathered.

2.3 Matching Aims and Objectives to Research

The aim of the thesis was:

- To investigate how colour forecasts are compiled, and examine their use, influence and accuracy within the fashion and textile industry, suggesting methods for developing more accurate forecasts in the future.

Three further objectives were drawn from the aim, which in turn raised a number of research questions, documented in Fig. 2.1. Research Questions. The objectives were:

- To contextualise colour forecasting influences within the fashion supply chain and critical path

- Establish how colour forecasting is compiled and identify similarities in influences and information sources used by the forecasters

- Examine the accuracy of colour forecasts and potential implications of inaccurate forecasts on the clothing and textile industry, suggesting methods for improving accuracy of colour forecasts.

Additional questions were developed at a later stage as a part of the ongoing research to establish what the thesis sought to answer. Two research questions were developed specifically related to the fashion and textiles supply chain.

1. Where does colour forecasting fit within the supply chain?
2. Where does colour forecasting fit within the retailers' critical path?

Although these questions might appear similar at first sight, closer inspection and understanding of the trend forecasting and fashion retail businesses will reveal that the two areas are in fact very different with differing time scales and imperatives. Understanding the compilation methods and information sources used to develop forecasts was the second key objective. Three research questions were established.

1. What are the key information sources?
2. Are information sources duplicated by forecasters, designers and colourists resulting in homogenous trends?
3. How are colour palettes developed?

Within the parameters of the research, gathering evidence either to support or disprove the issue of predictable colour trend cycles within the fashion industry as a means to develop more accurate forecasts was of particular interest. Did identifiable colours or colour palettes reoccur within specific time frames or not? The research questions developed from this area examined three aspects of the accuracy of forecasts as a part of the third objective.

1. Can colour forecasting be accurate if compiled over 2 years in advance?
2. What happens if information is inaccurate?
3. How can forecasts be made more accurate, eg. by following established cyclical colour patterns?

In order to answer such questions it was necessary to track and analyse colour trend predictions to evaluate their veracity retrospectively, and therefore establish the intrinsic end value of forecasting to industry. Evaluating whether the trends were accurate was achieved by reviewing two colour forecasting archives and comparing the predicted colours with the commercially recognised trends of the day, evidenced by press comments, and though interviews with designers, retailers and trend forecasters, and analysis of the colours to identify any specific cycles. The literature review also contributed evidence and opinion to support the primary research.

The study used qualitative research as the basis for achieving the stated aims and objectives as much of the data used was gathered using Strauss & Corbin's (1990) assessment of the main components of qualitative research:

- Data derived from interviews and observation
- Analytic or interpretive procedure

- Written & verbal reports

A set of objectives and research questions were developed, and an appropriate range of sources of information identified, coupled with techniques which could be use to extract the required data, as in Fig. 2.1, Research Questions.

Objective	Research Questions	Sources of Information	Techniques
Contextualise colour forecasting influences within supply chain & critical path	1. Where does colour forecasting fit within the supply chain? 2. Where does colour forecasting fit within the critical path?	• Retailers • Trend forecasters • Colour consultants • Available literature, books, journals & generic clothing industry texts	• Literature review • Data from longitudinal studies • Interviews with retailers, forecasters & colour consultants. • Forecasters mapping • Use of a grounded approach to analyse data using open coding & axial coding
How colour forecasting is compiled and identify similarities in influences and information sources used by forecasters	1. What are the key info sources? 2. Are info sources duplicated by forecasters, designers and colourists producing homogenous trends? 3. How are colour palettes developed?	• Colour forecasters • Colour consultants & colourists • Designers • Members of British Textile Colour Group • Key texts & industry journals	• Identify relevant data from longitudinal study • Observation of two colour development meetings • Interviews with colour palette developers, trend forecasters, designers, colourists, • Use of a grounded approach to analyse data with open coding axial coding • Literature review
Accuracy of colour forecasts and potential implications, of inaccurate forecasts for the clothing and textile industry.	1. Can colour forecasting be accurate if compiled over 2 years in advance? 2. What happens if information is inaccurate? 3. How can forecasts be made more accurate, eg. by following established cyclical colour patterns?	• Designers • Retailers • Review of historical data of fashion & forecasted trends • Trade journals & marketing journals • Discuss in season updates with Forecasters	• Interview designers, retailers & trend forecasters • Review historical evidence through trend archives • Compare trend archive evidence with relevant fashion periods • Discuss in season updates with forecasters • Info from trade journals & fashion magazines

Fig. 2-1. Research Questions

2.4 A Grounded Approach

A grounded approach was the most applicable form of qualitative research to be employed throughout the investigation, as it does not begin with a rigid theory which has to be subsequently proved or disproved. Developed by sociologists Glaser & Strauss in the 1960's, grounded theory starts by examining an area, establishes what is relevant, and thus allows the results to emerge.

'A grounded theory is one that is inductively derived from the study of the phenomenon it represents that is, it is discovered, developed, and provisionally verified through systematic data collection and analysis of data pertaining to that phenomenon.'

(Strauss & Corbin, 1990:23).

It is also useful when there is little or no prior knowledge of an area, as with colour forecasting. The basis of developing a conceptual framework using grounded theory should meet four central criteria for judging the applicability of the theory to a specific phenomenon (Strauss & Corbin, 1990), in this case, the development, of colour trend forecasting in the apparel industry.

- fit
- understanding
- generality
- control

The research initially utilised the open coding system developed for grounded theory users, making comparisons and asking questions, establishing categories into which the data fitted, understanding the nature of the data obtained, analysing it, and establishing if further intelligence gathering was required to answer the initial research questions. According to Glaser & Strauss, 1967, grounded theory is often referred to as:

'The constant comparative method of analysis.'

(Glaser & Strauss, 1967:101)

There are two versions of grounded theory, as Glaser and Strauss continued to develop differing styles, known as Glaserian and Straussian. Glaserian is closer to field based or hermeneutic qualitative research with less emphasis on the coding whilst Straussian focuses on the fragmentation of the data through a three stage coding process (Grbich, 2007). The Straussian approach to grounded theory was adopted as it requires the researcher to raise questions from their own insights, in this case personal experience of working within the colour forecasting industry. This allows further development of concepts and the exploration of their relationships.

Within a grounded approach, the initial concepts are the basic underpinning elements of the analytical process, which can often be difficult to relate to. However, by 'conceptualising data', or dissecting what has happened, it becomes easier for the researcher to compare specific actions, decision making processes or incidents.

Open coding was used each time data was collected, be it in the form of interviews, observations or during the longitudinal surveys. It helped to identify numerous processes around the questions Strauss suggested using;

- What is going on here?
- Why is this being done?

- What if this or that changed?

- What would be the outcomes of any change?

Within the observational and longitudinal studies it was interesting to note the quite different approaches to using trend forecasting information when developing colour palettes for future seasons, and so the questions suggested were repeatedly asked during the research process. A key part of this was not the variety or amount of trend forecasting information purchased, as that appeared relatively constant each season, but how such information is regarded, assimilated into new colour palettes, or potentially disregarded at each stage of the colour decision making process. Such comparative analyses were instrumental in establishing one of the study's key aims, identifying and exploring the synergies between information sources.

Following the open coding stages a process of axial coding was undertaken. From categories which had been established in the open coding process, one category is taken and linked to all the subcategories which linked to it. This helped determined how designers used colour trend information within their design and range planning activities, and its influence on the supply chain and critical path.

Indeed, the longitudinal studies constantly required that comparisons be made to establish any common areas of practice within the two organisations, and commonalities or anomalies associated with price point, target market and high fashion content. As both organisations operated within the UK industry, further expansion may be carried out on the global fashion industry by later researchers. Moreover, much of the additional data gathering for the purposes of the research was carried out in the UK; interviews with practitioners and users of information within the trend forecasting industry, plus the literature gathered cited global sources, which provided a more international view, if somewhat limited in scope.

The data gathering stage encompassed a variety of methods and sources, some of which were unique to the study, such as the forecasters mapping and a review of colour archives, the examination, comparison or categorising of the information to ensure its value to the research is clearly identified. The primary research methods are explained more fully below.

2.5 *Primary Research*

To date there has been little contemporary or historical research in the area of colour trend forecasting and how it is developed, used or interpreted by designers, and in the generic area of trend forecasting, and its accuracy. The literature review revealed two of the key texts previously identified (Brannon, 2000) and (Diane & Cassidy, 2005) are primarily aimed at undergraduate students, featuring exercises which may be useful in class.

Brannon proposed an interesting model regarding the predictability of colour cycles, which was employed during the review of the colour archives and proved valuable, and trend development principles, again useful for the research to compare with the primary research gathered. Diane & Cassidy had little key information regarding forecasting, devoting a considerable amount to an introduction to the fashion industry, colour theory and the compilation of a mood board. The mood board was very basic for undergraduates to grasp, and recorded in great depth, taking up much of the publication, but adding nothing to the research process itself. Additional publications have emerged throughout the duration of the research, notably McKelvey & Munslow (2009) and Raymond (2010). Moreover, many publications are now rather dated, such as Perna (1987) and Linton (1995). Consequently, the research focused on the generation of original data, and the necessary data required in order to best inform the overall aims and objectives of the research questions.

2.5.1 Longitudinal Studies

Two longitudinal studies formed the basis of the research and provided currency to the investigation. The studies specifically analysed the development and use of colour trends within design teams. Longitudinal studies are defined as:

'The same group of participants is surveyed at several times. Longitudinal surveys make it possible to assess changes with individuals over time.'

(Graziano & Raulin, 2007:328)

For the purposes of the surveys two retailers were selected, one from the value end and the other from the mid market high street of the UK fashion industry. The studies were conducted through a series of regular meetings, interviews and observations of internal design development and decision making meetings. The designers and other staff involved in the decision making processes comprised colourists, textile designers, buyers, technical colour specialists and garment designers. Such observation allowed the tracking of colour palette development and use for over two years with Retailer A, a large supermarket clothing retailer at the value end of the market, and a shorter period of one year with Retailer B from the high street. This was to ensure the complete design development cycle and annual critical path was understood within each organisation.

The processes were recorded in both written and picture format as much as possible, although some elements were deemed commercially sensitive and so were not recorded. Interviews and conversations with the teams and individuals concerned were intended to be recorded on tape and transcribed afterwards, but due to commercial sensitivities, most meetings had to be recorded in note form at the time and later transcribed.

As in Fig. 2.1. the longitudinal studies were used to provide data for two of the objectives, namely contextualising colour forecasting within the supply chain and critical path, and in

understanding how colour forecasting is compiled and the synergies between the information sources and providers. The second objective was addressed primarily by Retailer B, as they generated more of their own original, primary research in order to develop more unique forecasts which matched their product ranges and distinctive signatures more closely.

2.5.2 Observational Techniques

A considerable volume of information was gathered from observational techniques used within the longitudinal studies, but also from personal experience within a colour forecasting team, Global Colour Research, publishers of The Mix. Twice yearly a group of colour experts meet to discuss the latest colour trend developments, and present their ideas, with full details as to how their personal colour directions were developed. As the researcher was not only an observer in the process, but a participant, the study used participant observation, which is described by Jorgensen as:

'Rather than denying personal interests and values, the methodology of participant observation requires awareness of how these thoughts and feelings influence the research.'

Jorgensen (1989:27)

Further observation of colour trend development techniques was conducted with the British Textile Colour Group (BTCG) in London, an organisation encompassing the very best of freelance colour trend experts, and industry specialists, who compile two specialist fashion colour cards each year from their meetings. Observing one of their seasonal meetings from which their commercial colour cards are developed provided information for a comparative analysis of the approaches to trend development by a commercial forecaster such as Global Colour Research, and a members only specialist group such as the BTCG. The information also addressed one of the objectives of the research, namely how colour forecasting is compiled and the synergies between information sources. This was supplemented by information from the longitudinal surveys, interviews with practitioners and other primary data sources such as key texts and journals.

2.5.3 Forecaster's Mapping

To date there has been no systematic mapping or evaluation regarding the number of forecasters producing commercial information, the range of market or product niches, or the frequency with which the information published. Additionally, the nationalities and histories behind the diverse international group of forecasters has had little examination, other than individual cases (Brannon, 2000), which usually focused on the key, multinational forecasters such as Peclers or Promostyl. Identifying the delivery methods of trend information, such as CD-ROM, books, on-line resources, or audio-visual presentations, has also never been fully explored or documented. Both Brannon (2000)

and Diane & Cassidy (2005) comment on the techniques used to disseminate information to clients, without fully evaluating or comparing the various delivery modes. Diane & Cassidy focus on the development and presentation of 'mood boards', a compilation of concepts, materials, colours and images with which to convey the colour trend message. Much of the 'mood boards' or 'trend boards' information developed by the industry today are generated on computer, perhaps using some original or sourced images, and rarely with any hand drawn elements to them. They are sophisticated, and do not take a theme too literally, as Diane & Cassidy's methodology implies. Indeed Raymond (2001:220) suggests the 'mood board' method of communicating information 'is happily on the wane'.

The key players in the colour forecasting industry were identified, and their range of products assessed. The mapping considered the frequency and variety of publications, resulting in a much more comprehensive understanding of the material on offer. It assisted in the evaluation of the variety of formats used by the industry, and those preferred by the users of the information, contributing greatly toward establishing a geographical, historical and contextual map of the contemporary industry. The knowledge gained from the mapping contributed to the author's discussions with industry regarding specific styles, strengths or specialties of the forecasters, making a more detailed and insightful discourse available. It was of particular use when debating why individuals bought specific publications from one forecaster and not from another during the longitudinal surveys and the interviews, imparting another dimension to the underpinning knowledge of the product.

The mapping was continuously updated through the duration of the research in order to chart the introduction of new players, publications or information formats, although with so many individual entrants into the market, plus the online and mobile phone applications being generated the mapping was restricted mainly to those forecasters who published actual trend books rather than online or individual content.

2.5.4 Interviews

Interviews were conducted to establish additional historical, experiential and contextual information surrounding the subject area. Anecdotal information also supported findings from the longitudinal studies as to how colour trends are originated, and how the published information is subsequently used by designers within the supply chain and critical path.

Interviewees were drawn from several areas of the industry to broaden the scope of the study where existing literature was scarce, namely, Forecasting, Marketing, Design and Retail. The interviewees identified in turn suggested further sources of information, or potential interviewees, thus adding the body of primary research generated. The key forecasters publishing colour information today formed a major part of the interviews, representatives from the French forecasters Peclers Paris, Carlin, and Nelly Rodi were all interviewed, but despite repeated requests, an interview was not possible with Promostyl. The more specialist colour publications were also targeted, Li Edelkoort of Trend Union,

Global Colour Research, and the Pantone trend book compilers were approached for their specific market sector knowledge, as were experts such as Martin Raymond of The Future Laboratory, who have worked in the industry for a number of years, and who have experienced firsthand the changing nature of colour forecasting. Individuals who worked for some of the better known, now defunct forecasting agencies, such as Deryck Healy International, Design Intelligence and Nigel French provided an interesting insight into the operational methods, early data gathering techniques, and publishing formats for trend information in the 1970s and 1980s. Those using the colour information provided by the forecasters, including designers, retailers and colour managers within organisations proved useful to establish the different ranges of working practices in relation to the adoption, modification and use of commercially produced colour palettes and their accuracy. They provided an insight into perhaps why some colours are repeated season after season, or indeed, why some colours appear to sell and others do not.

The actual interviews were semi-structured, with a similar group of questions for each interviewee, establishing their personal background, and that of the organisation they work for, plus the methods of working, data gathering, synthesis and accuracy. When analysed in parallel with the longitudinal studies, literature review and forecasters mapping the interview results contributed significantly to the establishment of an unequivocal understanding of the industry and processes therein, specifically to the methodologies used in developing colour forecasts, and the role of intuition in the creative process.

2.5.5 Colour Archive Exploration

The examination of historical colour trend forecasting books provided the basis of the colour cycle analysis, establishing whether or not any identifiable cycles in colour forecasting trends which could be adopted to make forecasting more accurate, as suggested by Brannon (2000), and how these are acknowledged, if at all, by the industry.

'Forecasts do not provide the answer. Instead, forecasting opens a window on the probabilities of the future.'

(Brannon,2000:24)

Such views are also supported by Patricia Gray in Fashion Marketing, edited by Easey (2002:92).

'Anticipating what buyers are likely to do under a given set of conditions is made more difficult by the eclectic nature of fashions, so any predictions about the future should be flexible and open to modifications.'

An examination of two trend book archives spanning decades from the 1980's to 2000's, helped to provide information to identify whether or not predicted colours were accurate, by comparing them with commercial designs of the period, mainly from the international catwalks, and magazine and journal commentary from the period. The Promostyl archive

at London College of Fashion shed some light on the theory of colour cycles, adopting Brannon's colour cycle model (2000) to challenge the theory. Brannon's model was used to test the theory of recurrent and predictable colour cycles; she proposed groups of colours, such as earth tones, achromatics (colours comprising black, greys and whites) or purples, dominated fashion trends for a period of between three to four years before being repeated. The model was based on colour data gathered between 1972 and 1992, a slightly different time period to that of the archives studied for the thesis. Arguably more importantly it provided additional information regarding the application of core, or basic colours within the industry, and how they can simultaneously be core and fashion colours in any given season. It was interesting to note the differences between the seasonally predicted colours, as most writers on the subject (Brannon 2000), (Cassidy & Diane 2005), (Raymond 2001) acknowledge that Spring and Summer colour predictions tend to use brighter, clearer colours traditionally then Autumn and Winter colours. This was compared with colour trend information from varying sources during the same period.

2.6 Additional Information

Further research was required to substantiate findings from the longitudinal studies, and establish the relationship between the actual 'fashion' colour palettes used in range production and those high fashion palettes predicted by the forecasters. This unfortunately did not encompass the analysis of sales data, which would have ideally provided a clear barometer of consumer choice and product successes or otherwise for specific colours, as both companies declined to provide the data required for the research, therefore there is no quantitative research for this area. However, there was discussion regarding recent colour successes with each retailer in the longitudinal surveys, and specific preferences of individual design and buying directors which influenced colour selection on occasion. Such information was also available sporadically in specialist fashion and textiles trade publications such as Drapers, Lingerie Buyer and International Textiles.

3 Review of Literature of the Fashion Forecasting Industry

3.1 Introduction

"The only safe prediction is that fashion will ultimately change." Sproles, (1979:209)

The chapter will examine the range of literature available regarding colour forecasting, and supporting material, essentially what is known about the subject at present. It will identify areas where there are gaps in the current knowledge and set the parameters for the research in specific, under researched areas. It will also highlight what is unclear, underdeveloped or outdated in relation to the extant literature, establishing the current body of literature.

3.2 Current Available Literature

There is a considerable amount of information available regarding the fashion and textiles industry at both UK and global levels; the industry has been well documented as it has significant impact on the world economy, valued at £13.9 billion in the UK alone in 2006 (Easey, 2009), rising to £21.2 billion in 2008 (Mintel, 2008) . It supports a wide range of peripheral industries such as advertising, freight, packaging, chemicals, cosmetics and perfumery. Even in times of apparent recession, some areas of the fashion business continue to perform well, such as Italian designer label Prada, whose sales in 2007 rose 17% to $2.5 billion (Kapner,2008), thus it remains a significant and exciting area of research for academics. Much of the extant literature examines the business of fashion, marketing, financial modelling, branding and retailing with little regarding the value of forecasting itself. However, a recent report estimates trend forecasting could have a global market value of $36bn, based on the January 2011 report from publishing group Emap, owners of WGSN, (Worth Global Style Network), a trend forecasting website with more than 38,000 subscribers. The site generated £40m of revenues in 2010, up by 5pc on the previous year equivalent to the same amount of revenue generated by all of Emap's magazines put together (Barnett, 2011). Such evidence points to the overall monetary and business value of generic trend forecasting, not just the fashion and textile industry, but to other associated industries which also use such data, including automotive, cosmetics, interiors, electrical and other consumer goods (Brannon, 2000).

Unfortunately for the research, there is a dearth of published literature examining the area of trend forecasting, and even less focused on colour forecasting, and no data was found regarding the overall value of the colour forecasting business. This was not surprising since much of colour forecasting is produced in conjunction with other fashion trend forecasts and can be bought as a part of a package of information, or as a separate information pack. Consequently, the research has concentrated on supplementing the

literature as much as possible with information from a range of more generic fashion and textile industry publications.

3.2.1 Fashion and Colour Forecasting Books

As outlined, there are few books or academic journal articles on the subject of forecasting, and specifically colour forecasting. It became clear that there were significant gaps in the extant literature particularly surrounding the areas of the development and use of colour forecasting within the fashion supply chain, and in determining the accuracy of predicted colours. There was also little substantive evidence of research into colour cycles, which the thesis also explored. The thesis aimed to contribute to new knowledge in these areas in particular, providing a more contemporary perspective, as the majority of the key forecasting texts were somewhat dated.

Only two books were identified addressing the area of colour forecasting (Linton, 1994, Diane & Cassidy, 2005). Of these, almost half of Diane & Cassidy's, *Colour Forecasting* is devoted to either contextualising the fashion industry, or somewhat mundane exercises for students developing trend boards, and thus of little significance to the research. The remainder of the book provided a far more simplistic view of colour forecasting and the industry than this author's personal experiences working with colour forecasters suggests. Some illustrated models of the role of colour in the production and range planning process were of use, but overall the book was found to be of somewhat limited value due to its obvious design for the undergraduate market.

Linton (1994) provided far more useful information regarding specific organisation, views from colourists and forecasters and analyses of colour cycles, and was perhaps the most useful text accessed. Harold Linton had edited the book, so there were a variety of valuable contributors from the world of colour forecasting, including a chapter by a senior member of the large and well known Peclers trend forecasting agency. However, it now appears a little dated in parts, and there are elements of the book which are so outdated they have been difficult to use. Nevertheless it proved a useful publication, covering aspects such as colour forecasting decision making, and information regarding colour trends and cycles in fashion, plus more historical context. A clear indication of how important colour forecasting has been regarded from the period comes from Tom Porter writing in Linton (1994:1):

'Many fashion industries such as clothing, beauty and cosmetics depend heavily upon our constantly shifting colour tastes for their existence. Indeed, their survival in the marketplace hinges upon the accurate forecasting of tomorrow's trendsetting colours.'

The book also contributed much to Chapter 8, exploring colour cycles within the fashion industry.

Arguably one of the most influential books published in recent years, *Fashion Forecasting* (Brannon, 2000), studied fashion forecasting in its entirety as a discipline, incorporating some interesting information on colour trend development and cycles. It also acknowledges contemporary methods of colour communication and trend publication, such as CD's and the Internet. It proved a valuable resource for many aspects of the research, including elements on colour cycles, information gathering and trend development processes which are modelled and explained thus:.

'Forecasting is not magic practised by a talented few with a gift of seeing the future; it is a creative process that can be understood, practiced and applied by anyone who has been introduced to the tools.

Brannon (2000:24)

Brannon uses her academic background to good effect in the analysis of the forecasting industry and its practices as a whole, and the text is easy to follow and well written. Undoubtedly, a stronger, more in depth focus on colour would have helped significantly, but as a generic guide to trend forecasting in fashion it proved excellent. Two of Brannon's models, one for the synthesis of information into a final trend forecast, the other a model of colour cycles, were used within the research to benchmark contemporary practice against and map cycles of colour against, as discovered in the review of the Promostyl colour trendbook archive in Chapter 9.

One other publication by Perna (1989) also focused on the generic area of fashion forecasting, and provided another useful insight into the industry. It was very American biased, so some elements were hard to relate to the UK or European market, and, as with Linton's *Colour Forecasting*, being an older text, some practices were clearly outdated. It did not cover the area of fast fashion, which was very much in its infancy when Perna published *Fashion Forecasting* in 1989. It certainly helped to benchmark the industry across the years and contextualise changing practices of forecasters. These key texts formed the basis of the early part of the literature review being the extant literature at the inception of the study. One further text *The Colour Compendium*, by Hope and Walch, 1990, was used for additional reference material regarding the establishment of The Colour Association of the United States (CAUS), as Margaret Walch is the Chief Executive of CAUS. It provided further supporting material regarding the evolution of colour forecasting and the overall use of colour in more generic terms across varying product areas. However, it could not be suggested that it fully explored, explained or examined the area of colour or trend forecasting. Additionally, Fehrman and Ferhman's 2000 publication, *Colour, The Secret Influence*, contained many useful references to colour, but only dedicated one chapter to colour in fashion and textile design, others examining subjects such as colour and health. Nonetheless, their historical charting of colour trends

in fashion and supporting views on how colour trends develop have proved valuable as they believe:

'The ideas for a new season's colours generally grow out of the existing popular palette. They assimilate the impact of everything from media events such a hit film, book or major art exhibition, to living trends, or economics.'

(Fehrman & Ferhman, 2000:162)

Their views support the information gathered from the other key texts regarding the sources of inspiration in colour forecasting. Since the investigation began in 2003, several new texts have been published which have contributed to the research; for example, a directory of fashion forecasting by McKelvey and Munslow (2008) which lists the major fashion forecasters both published and on-line, examining the services and styles of each company. They describe contemporary forecasting thus:

Forecasting is a tool used by designers, manufacturers, retailers, marketers, CEOs to give their brands creative dynamism in an increasingly competitive marketplace.

McKelvey & Munslow (2008:pviii)

In 2005 Watson published *The Trendmasters Guide*, an A-Z of what should be considered when developing trends. With a strong retail background, including over 10 years experience at US clothing chain Target as Trend Director, this was written for the mass market, in a style which did not add sufficient detail to the specific sector of fashion trend forecasting, and was thus of more limited use. The most recent book by Raymond (2010), *The Trend Forecasters Handbook*, was published toward the end of the study and is not specifically written about fashion forecasting, covering many contemporary aspects of generic trend forecasting, including electronic and digital forms, which earlier publications were not able to do. It also adopts a more holistic view to forecasting, and is less prescriptive in its approach than Brannon and Perna, one which is not specifically fashion trend led, but incorporates all forms of products and scenario planning. The approach delivers a broader based analysis of trend development and a 'how to do it' guide for students with tips on developing quite specific trend forecasting skills. There is a very useful chapter surrounding intuitive forecasting, which was identified during the research as a key contributing factor in the development of colour trends. Raymond himself runs a well respected organisation called 'The Future Laboratory', a consumer-insight, brand-strategy agency, with clients including Louis Vuitton, BMW and American Express. His expertise as a practising forecaster naturally enhances and gives further credence to the text.

From the extant literature concerning forecasting and colour forecasting processes specifically, Brannon (2000), Linton (1994), Perna (1985) and Raymond (2010) provided the most comprehensive and valuable contribution to knowledge of the subject overall;

Diane and Cassidy (2005) would provide a solid basic introduction to the subject for those who were unaware of the subject matter, whilst McKelvey and Munslow (2008) produced a very solid guide to the key players in the fashion forecasting sector, but with less analysis and exploration of the processes involved in forecasting.

3.2.2 Fashion Specific Publications

There are numerous chapters and references within a broad range of books on the fashion industry and fashion marketing in general, which incorporate elements and commentaries on colour or fashion forecasting which have been referenced. Of these, Guerin's *Creative Fashion Presentations* (2005) provided the most useful range of insights and information regarding copious iterative processes within the fashion industry, from early fabric concepts, forecasting systems, through to the retailers processes and viewpoints. It also established further knowledge regarding the fashion cycle and relevant development processes within it where forecasting would be appropriately utilised. Almost all the examples given were from the US market, but as the principles in the garment industry worldwide are very similar, this was not found to be limiting. Also of note is Burns and Bryant's *The Business of Fashion* (2002), which again provided a wealth of information by which to contextualise the global fashion industry, covering most processes from design inception to the final product and the retailing issues surrounding product development.

Publications examining the specific areas of fashion marketing, such as that edited by Easey in 2009, or Hines and Bruce's earlier publication from 2001 provided further information regarding the fashion cycle. These were supplemented by marketing texts including Malcolm Gladwell's 2002 *The Tipping Point* examining viral marketing and new approaches required by a broad range of industries as the internet and new communications technologies facilitate such a new approach to marketing products. The American trend analyst Faith Popcorn's *Eveolution* (2000), introduces the notion of trends selling a vast range of product categories, note simply fashion products, and specifically marketing them to women. The book approaches trend analysis much in the same way that Raymond (2010) discusses trend forecasting, more holistic, distributed across a broad range of industries and taking cues from all aspects of lifestyle and cultural drivers. Carr and Pomeroy's 1992 *Fashion Design and Product Development* book, Goworek's *Fashion Buying* (2001) and Wills and Midgely's *Fashion Marketing* from 1973 established the changing nature of the fashion industry and the role of the retailers in more depth over the decades. Useful material was gleaned from these texts and used in part in the historical overview of the industry in Chapter 4.

A range of books discussing fashion theory were used, notably Sproles's titles *Fashion: Consumer Behaviour Toward Dress* and *Changing Appearances* from 1979 and 1994 respectively. These were supplemented by *The Fashion Reader*, an edited edition covering key fashion theories by Welters & Lillethun, 2007, and Lynch's 2007 publication

Changing Fashion, both of which examined various fashion theories and cycles, including the trickle up, trickle down and trickle across theories discussed further in Chapter 5.

3.2.3 Journals and Online Resources

A number of academic journals proved invaluable in providing the foundations upon which to build the picture of the industry, and the peripheral forecasting business. Rich sources of information included *The Journal of Fashion Marketing and Management* with articles on the fashion industry in general, *The Journal of Retail and Distribution Management* for more specific fashion retail, brand and marketing issues, *The Journal of Clothing Science and Technology* featured good articles on the creative processes of designers, consumer demands, supply chain issues and the UK clothing manufacturing industry, as did *The Journal of Textile and Apparel, Technology and Management,* but from a more global perspective . Retail and consumer journals have also proved important, in particular *The International Journal of Retail and Distribution Management, The European Journal of Marketing* and *The Journal of Consumer Research*, which provided rich sources of information regarding consumer perspectives and buying behaviour. Journals from Trade Associations such as *The Journal of The Textile Institute* and *The Journal of the Society of Dyers and Colourists* provided more specific information regarding colour forecasting, the prediction of colour trends, colours in textiles and clothing, and branded goods. There was also a substantial amount of literature assessed from trade journals, fashion magazines and newspapers, carrying articles related to fashion and colour trends.

Many academic papers have focused on the analysis of the design process, Sinha (2002), Mete (2006), Kim & Johnson (2008), or retail product development Gaskill (1993), Chocalchatpinyo et al (2002), which in turn allowed the positioning of the forecasting material and its use to be more clearly defined. An area of emerging research, creativity and design inspiration, has helped to establish some interesting facts, such as Sinha's (2002) study of five companies within the fashion industry, which concluded that 'the ability to recognise new trends' is one of the key areas of expertise a designer brings to a company. Examining the sources of creative inspiration in clothing design, Mete (2006:289) placed particular emphasis on fashion research and forecasting, noting that:

'Colour is usually the starting point of each season and often acts as a springboard for materials/fabric direction and trend research.'

Mete (2006:289)

McAdam and McClelland (2001) also supported the notion that creativity is essential in terms of innovating new products for the textile industry in the UK, and that specific individuals in organisations were often seen as being 'particularly creative', who would be approached to 'bounce ideas off'. Considering the design of new products Kim and Johnson (2009) surveyed 62 apparel designers, production managers and senior

professionals in the US apparel industry who identified 'popular culture, including professional athletes and celebrities' as a continuing source of inspiration in the future. Such research regarding the design and creative process was also invaluable in establishing how colour information was used in the creative process, and what sources of information might be used to gain such inspiration. This would be later used in Chapters 6 and 7, when identifying inspirational sources of forecasters, and again in analysing working practices within the longitudinal surveys.

The role of consumers, their fashion innovativeness, adoption of trends and fads were covered by Muzinich et al (2003) and Tepper Tian et al (2001). Each of these elements are essential toward understanding the arena in which fashion and colour forecasters operate, the influences and constrictions on the industry and how forecasted trends are interpreted both by designers, industry and the consumer. The lack of specific papers related to trend forecasting, and more specifically colour trend forecasting has resulted in much of the material coming from non-academic sources, although there were articles found which covered the subject in relation to other research, for example Cassidy (2007) examined personal colour analysis and consumer colour preferences in the context of colour forecasting; consumer colour choices were also analysed by Moore et al (2001), Grossman & Wisenblit (1999), and Eskilson (2002) who examined the rise in the use of colour in products and marketing, which he termed 'The Chromatic Revolution' between 1914 - 1934.

'The new employment of colour coincided with an increasing focus on consumption among retailers.'

(Eskilson, 2002:28)

Eskilson's analysis was especially relevant as the timings directly correlated to the inception of colour forecasting and trend forecasting in the United States, as will be covered in more detail in Chapter 4. Further papers regarding fast fashion practice and processes contributed to the understanding of the role fast fashion has played in changing the nature of the global fashion industry during the past twenty years such as Bruce, and Daly's 2006, Buyer Behaviour for Fast Fashion, or Tyleret al 2006 Supply Chain Influences on New Product Development in Fashion Clothing, and how it will develop in the future, with Kim and Johnson's two part investigation from 2009, Forecasting the US Fashion Industry with Industry Professionals.

The wealth of journal papers made a substantive contribution to the understanding of the industry and its changing practices overall.

3.2.4 Supporting Literature Available

Additionally, several MA and BA theses have been used to support the range of literature assessed, providing some useful, if limited, insights and surveys with retailers and

designers. A Master's thesis by McIlvenna (1991) conducted research to ascertain what proportion of manufacturers, designers and retailers used fashion forecasting information. This clearly did not specify colour forecasting, but used trend forecasting as a generic term. There was little specific mention of colour trends within the thesis. However, data regarding application of the prediction packages proved useful in establishing a base line of practice in the industry, although somewhat dated.

One PhD has also been written which was later extended and published as a specific colour forecasting book in 2005 by Diane & Cassidy. Again, as in the book by one of the authors, there is little to establish how colour forecasting information is used by designers, its accuracy, or role within the product development and range planning activities, and much is focused on soft systems analysis.

The Munsell Book of Colour provided a more scientific approach to viewing colour, and a basis by which the colour forecasting archives were viewed and categorised and so was an invaluable tool for the research.

Numerous journal articles have been studied to establish the context within which colour forecasting operates, but has provided little substantive information directly relevant to the research, concentrating on the development of learning based fuzzy colour prediction systems (Hui et al, 2005), historic colour trends (Stansfield & Whitfield, 2005), fashion innovativeness and adoption (Beaudoin et al, 2003) (Tepper Tian et al, 2001), (Muzinich et al, 2003).

There is a notable gap in the literature surrounding the influence of colour forecasting within the supply chain and the retailers' critical path. Little research has been carried out into the use of colour forecasting within retail brands, and how they develop colour palettes and make colour decisions although Raymond (2010) does cover some more generic aspects of this. There is also very little reference to the accuracy of colour forecasting, and whether or not this could be improved at all during these development and application stages. These areas form the basis of the investigation and are where the gaps in current knowledge lie, and where the thesis aims to add new knowledge.

At present, the low volume of quality academic material available specifically analysing colour forecasting is unlikely to change significantly, but each source has been assessed as to its critical importance to the literature review and the continuing development of the study. By broadening searches to incorporate issues such as design inspiration, creative processes and fashion marketing, additional supportive and valuable information has been gathered and applied to the research.

3.3 *Review of Current Practice in the Fashion Development Cycle*

The literature revealed that within today's' fashion industry, the fashion development cycle is of vital importance in the merchandise's critical path, impacting on all sectors of the

apparel supply chain. Successfully getting a product to market and subsequently sold to the consumer at the right time in the seasonal fashion calendar is vital to the designer, supplier and retailers profit margin. Today, more than ever, the timely arrival of products in store can make a tremendous impact on the overall volumes sold and the profit generated. Many retailers work on an approximate six month cycle from garment design concepts, sampling and final samples to delivery, warehousing and distribution to stores, and have several seasons running in parallel at any given time, featuring a number of 'phases' within each season. There may be as many as six phases within one season, each slightly different from the last in terms of design, colour and fabric selection. Fashion, by its very nature, has always been subject to change and the literature review supported the response to a demand for change from an increasingly innovative society over recent decades (Sproles 1979, Lowe & Lowe 1984, Bruce & Daly, 2006); a theory of a finite life lifespan is widely supported by fashion theorists such as Chocalchatpinyo et al (2002) and Meyersohn & Katz (1957). Arguably, as fashion is publicly consumed, there is a risk of highly visible failure (Muzinich et al, 2003) resulting in considerable pressure on retailers and consumers to provide and select appropriately. Consumer magazine articles supported the example of the explosion of greys as a trend in 1996 and 1997 and thus helped to establish what colours were available and provided valuable reference points for the examination of the colour trend articles:

'Grey hit critical mass last autumn (although it was already on the agenda a year before that with school uniform inspired looks at both Miu Miu and Prada).

(Holgate, 1998:61)

Journal papers in particular, plus key texts by Linton (1994) and Perna (1989) revealed that the nature of the fashion cycle and retailing has changed dramatically since the advent of the internet and on line data management systems in the 1990's; the new media allows greater opportunity for such visible failures to be more widely and rapidly disseminated than previously (Bruce & Daly, 2006). Additionally, consumers have become exposed further to fashion as a result of 'fashion magazine' web sites devoted to disseminating the latest fashion trends to consumers as quickly as possible. Brands have had to establish stronger marketing strategies to maintain and increase sales as a result, and the key to successful products today is in the market and trend analyses carried out during the early stages of the fashion development cycle (Bruce & Daly, 2006), (Le Pechoux et al, 2002).

The life span of a specific fashion trend also appears to be moving much more rapidly than ever before, according to the literature, seemingly in response to the increase in consumer fashion awareness and the demand for new merchandise each time consumers visit a store. In the early 1990's the average life span of a fashion trend was around one year, by 2000 that had reduced to just five months on average (D'Innocenzio, 2000).

Designers such as British duo Clements Riberio have often been left with just two weeks to design their collections after factoring in the entire critical path, and yearn for the less frenetic days of the 1980's when designers were able to evolve their looks slowly over a period of years (Armstrong, 2000). In response retailers have developed a retail mix today to manage the pace of change in fashion trends and the entire product development cycle behind it. It encompasses a combination of merchandise, price, advertising and promotion, customer services and selling and store layout and design cited by the retailers to meet target customers needs (Dunne et al, 2002). Even in 1994, Linton recognised that trends were moving faster than ever:

'What has changed over the past several years is the amount of time it takes a trend to move beyond the high end. That cycle is speeding up somewhat.'

Linton (1994:63)

Such short cycles put a tremendous amount of pressure on designers and forecasters to get the concepts right first time with substantial emphasis placed on accurate colour prediction within the initial planning stages (Easey, 2009). The entire supply chain is affected by such time pressures but as Tyler et al (2006) identified, the spinners are the first to require information in the chain, followed by the weavers, and thus the forecasters need to;

'Plan the colours, styles, and fabrics at least 18 months before they reach the shops as garments.'

(Tyler et al, 2006:321)

How the sell through factor could be improved in fast fashion was investigated by Ekwall et al (2006). Sell through is the comparative amount of merchandise that a retailer orders, against what is sold and what is sold at full price or marked down is determined from such statistics, which are monitored on a weekly basis by retailers.

'In the fast changing market it is important to spot trends quickly, design and produce the products and transport them to the stores at the shortest time possible. It does not help if you spot the trends early if you are not able to produce them in a reasonable time. If the products can't make it to the stores in time, the result is overstocking and selling to markdown prices due to obsolescence.'

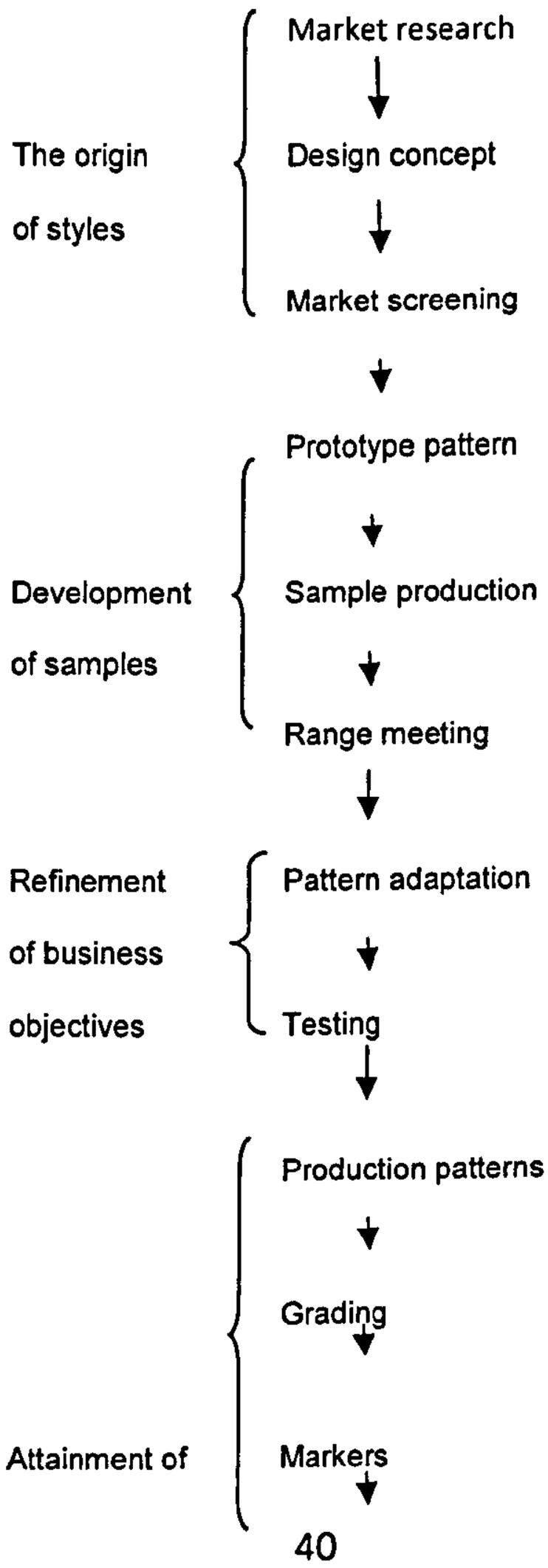
(Ekwall et al, 2006:90)

Ekwall et al found that fast fashion principles were not a guarantee for higher, full price sell throughs, and that the manufacturing and distribution systems were just as vital to ensure products reached the stores at the appropriate time, indicating that even if colour was correct, other factors within the supply chain could easily impact on sales figures and result in garments not selling.

3.4 *Product Development Process Models and Lifecycle Implications for Colour Forecasting*

The literature revealed that merchandise on offer has a clear life cycle in store related to consumer purchases, but the time and iterations taken to reach that point are of particular interest to the trend forecasting industry, which are theoretically able to have a strong input in many of the stages of the fashion product cycle. It is apparent that fashion and colour trend forecasters assist the industry in providing early information and concepts regarding a wide range of products, components and accessories.

In examining the literature, the 1992 theoretical model of the apparel design and development process by Carr & Pomeroy's provided a clear model of the processes involved in the fashion cycle, but does not include trend, or more importantly for these research purposes, colour selection. What it does illustrate is the importance of research and the design concept at the original stage of style development, supporting earlier evidence by the key texts by Brannon (2000), Raymond (2010), and others.



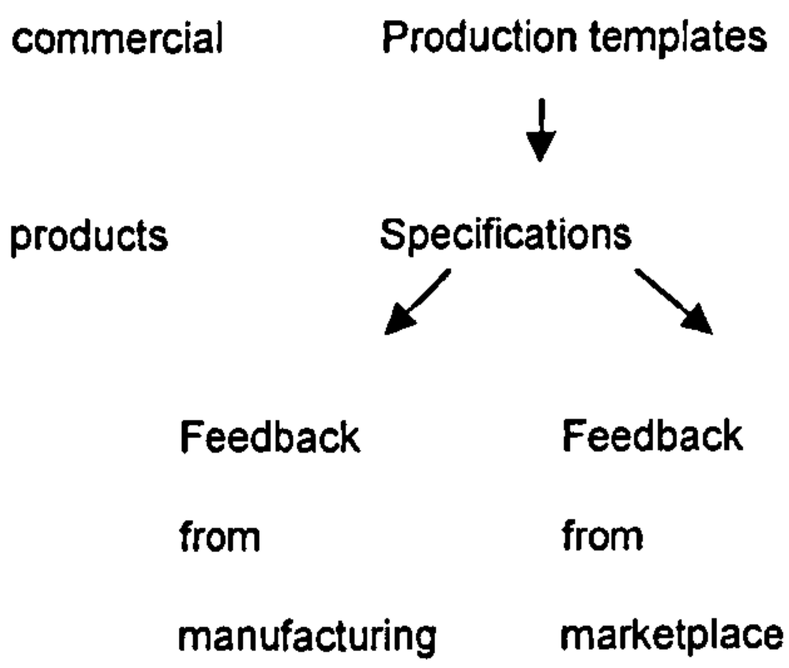


Figure 3-1: Carr & Pomeroy's Process of Design & Product Development (1992)

In searching the literature for an alternative retail product development model, that devised by Gaskill (1992) proved a more useful model to adopt when considering the place of fashion and colour trend information in the entire cyclical process. Gaskill's model (fig. 3.4) clearly illustrates the need to place trend analysis at the very beginning of the entire fashion development cycle, often around six months before the merchandise reaches the store, and the importance of the colour palette selection at the centre of the process. Bruce & Daly (2006) cite an even earlier time frame, Such a pivotal role in the early stages of development, and the number of elements influenced in the cycle by colour and trend development indicate the importance of getting accurate colour and trend information as early as possible in the sequence. This will be examined further in Chapter 6.

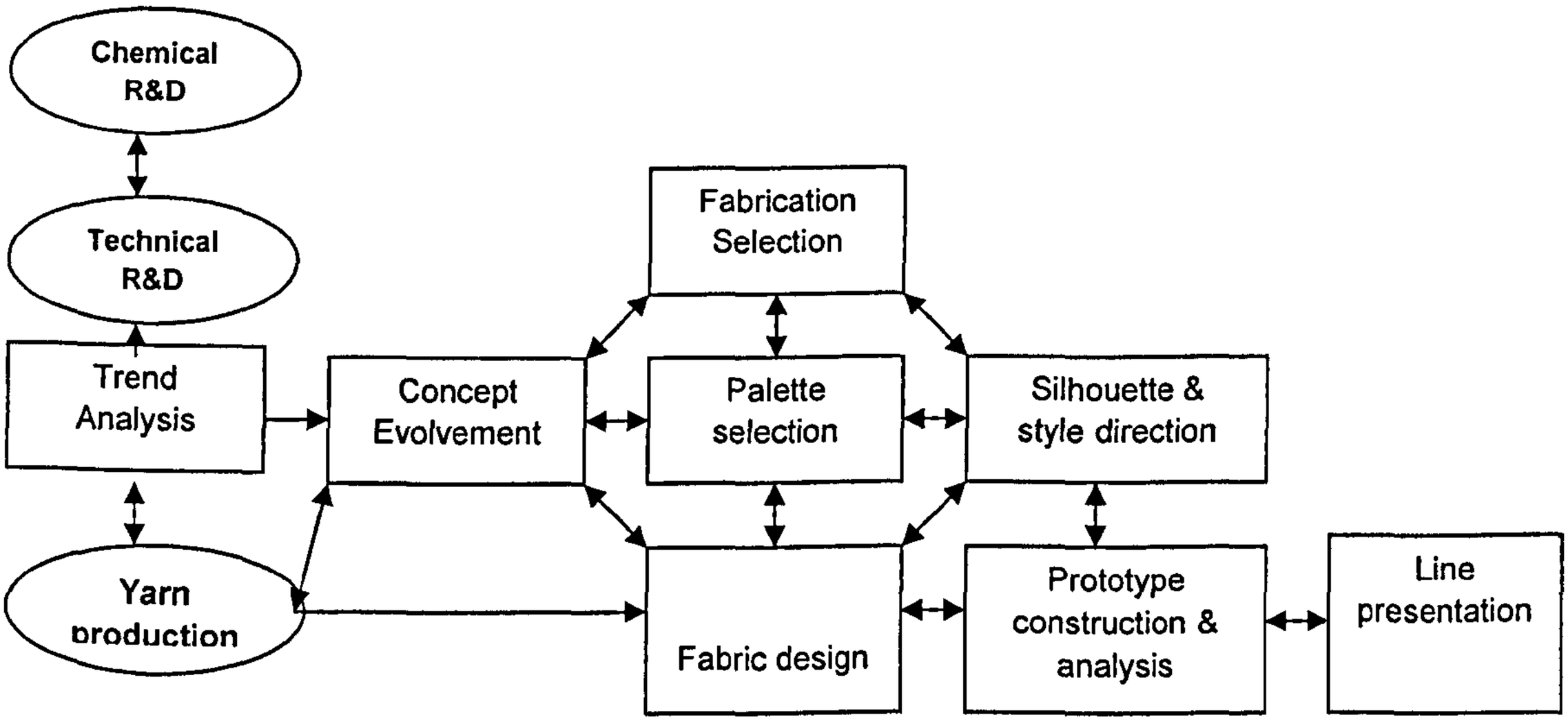


Figure 3-2: Gaskill's model of design development processes (1992)

According to the extant literature, colour forecasters typically begin their idea development for a specific season over two years in advance. The Colour Marketing Group, or CMG, is an influential trend forecast group in the US. Formed in 1962, it has over 1500 members and holds a conference twice a year to develop their seasonal colour card. The CMG colour card contains two categories, current, colours now in use, and directional, colours to be used in the coming 19 months or more (Lambert, 2004). Global Colour Research, publishers of colour forecast book The Mix, hold their trend development meetings up to two and a half years in advance of the season for which they are predicting the trends. It is important that colour forecasters adhere to the schedule in order for the manufacturing schedules of the fibre and yarn manufacturers, fabric mills, garment designers, manufacturers and retailers to be able to produce their segment in the fashion supply cycle on time each season. Additionally, each aspect of the cycle has to consider the market for which they are manufacturing, colours may be quite different in the active sportswear market than in the lingerie or knitwear market (Webb, 1994).

As illustrated by Gaskill's model in Fig 3.2, there are four key aspects of apparel design:

- trend analysis
- concept evolvement or evolution
- colour palette selection
- silhouette and style direction.

However, in order to fully appreciate the scope of colour trend influence outside these areas, it is important to look at the peripheral industries that also need to work with the manufacturers, designers and retailers to bring products to market. Such aspects of development will be explored further in Chapter 6, and an alternative model to those introduced here will be proposed by the author.

3.5 Summary

Current academic literature clearly is limited in the area of very recent colour forecasting publications, but a wide range of supporting literature, surrounding the trend and product development process, the origins and life cycles of trends, the design process, consumer behaviour, fashion marketing and trend adoption theories have proved invaluable in composing a clear picture of the contemporary industry. Journal papers and the trade press have also provided a more contemporary view of the dynamism associated with trends and colour development, supported by the wider media, consumer magazines and fashion journalists commentary. The available publications allowed a clearer picture of

industry practices to emerge in respect of colour forecasting tools and how they are integrated into the design, manufacturing and retail processes.

Analysis of the information established an image of an forecasting industry which has developed into a $36bn global concern (Barnett, 2011), with numerous facets and contributors. It is not simple to define colour forecasting, although some such as Diane & Cassidy (2005) have tried, as it encompasses a broad range of practices, job titles, organisations within the supply chain, and of course, consumers. The process of mapping the timescales used within the industry to develop colour is far easier to establish, as there is considerable information available regarding the fashion cycle (Brannon, 2000, Diane & Cassidy, 2005), Tyler et al (2006), but the ephemeral and subjective initial sources of inspiration, concepts and their subsequent refinement into commercial colour palettes used in product design and development can be more complex to convey. It appears there is no one methodology which may be applied to colour forecasting, although it is usually acknowledged from the research as the initial step in product development for the fashion industry, as yarns and fibres need to be dyed before fabrics can be woven or garments knitted, and so some have placed trends right at the beginning of the cycle (Gaskill, 1992). However, fast fashion is beginning to change the traditional model, as discussed, and has resulted in many organisations now keeping a range of greige yarn and fabrics, ready to be bulk dyed in the latest fashion colour when required, as delays in getting a product to market affects sales even if the colour is on trend.

The old models of fashion diffusion, trickling down from the higher end of society, trickling up or across within bands of society appear to be blurring, with no one theory fully withstanding modern consumer culture and the cult of celebrities and their influence of fashion trends.

Few authors have attempted to assess the accuracy of colour trend forecasting, or indeed how it is translated by users such as designers or buyers working on apparel development. In short, it is a subject about which the literature review has revealed there is very little written evidence to date, despite colour forecasting being an integral part of today's global clothing and textile industry, which some believe is indispensable (Franck, 2000), something of which the investigation aims to establish the veracity. It will also contribute to plugging the gaps in current knowledge related to contemporary practice, as the majority of the texts referenced were from relatively dated sources, such as Brannon (2000) and Linton (1994). The research conducted contributes to the field of study and has a clear element of originality in the longitudinal studies, the analysis of the colour trend archives, and the observation and documentation of the trend development process, as discussed in the following chapters.

4 Historical Overview of Trend Forecasting

4.1 *Introduction*

'Forecasting is like trying to drive a car blindfolded and following directions given by a person who is looking out of the back window.'

Philip Kotler (1972:192)

Defining fashion forecasting is not a simple task. The process has evolved over the last century from a simplistic marketing tool into a multi-million pound industry that is today equally lauded and derided by fashion designers, manufacturers and retailers worldwide. As the pace of fashion change has increased over the last 25 years, so the organisations involved in the prediction of fashion and colour trend information have been compelled to examine their research and presentation methods, marketing, customer demands, portfolio and publication format. It is therefore idiosyncratic that Kotler's quote from 1972 is still of the utmost relevance today; predicting the future fashion colour palettes accurately will always be a challenging task, especially when the initial colours are developed over two years in advance of the season. As indicated in the literature review, many believe that it is impossible to predict accurately what relevance a colour palette will have so long after its inception. This chapter will document the development of trend forecasting from its early beginnings in 1915, to contemporary practices including new technologies and digital formats which allow information to be conveyed instantaneously around the world. It examines the four major methods by which forecasting information is disseminated to clients, including the use of traditional and more recent formats.

4.2 The Development of Fashion Forecasting

The first known colour trend forecast was issued in 1917 by The Textile Colour Card Association of America (TCCA), which primarily focused on colours for the burgeoning women's clothing and accessories markets. This was essentially the American clothing and retail industry's reaction to the First World War, which had effectively stifled the famous Paris fashion industry and its global influence. The US needed to provide information for its garment manufacturers which would previously have come from the haute couture houses regarding the latest, most fashionable colour, fabric and garment styles. By providing a home grown alternative, the colour forecasting industry was accidentally created.

4.2.1 Colour Association of the United States (CAUS)

Following the lack of fashion information available from Paris, the precursor to the first colour trend card was the inception of the Colour Association of the United States (CAUS) in 1915, a group of manufacturers and retailers who had previously relied on information

from Paris to develop their colour, fabric and apparel lines. Firstly the group published 'The Standard Color Reference of America', a book featuring wool. Cotton and silk colour standards referencing 106 shades on silk ribbons. The colours were based on the colours of nature, college and university colours and colours from the US armed forces at the time. The initial 1917 TCCA card featured '40 colours presented in silk and wool swatches' (Hope & Walch, 1990:34). The colours were aimed at the women's clothing and accessories markets and were developed to appeal to stylists and designers. Today CAUS continues to produce colour forecasts and has members drawn from all aspects of the fashion industry, all of whom volunteer their expertise in compiling the colour palettes, which now encompass interiors and product design, and has become increasingly sophisticated since the initial publications.

4.2.2 Tobe and Associates

As manufacturers and retailers adopted colour forecasting information more widely, the concept of producing written trend analyses and forecasting reports began to be formed by Tobe Coller Davies. Coller Davies had been working for Macy's department store in the merchandising team, developing display ideas to increase sales figures in the mid 1920's. Her keen eye for detail, gathering ideas and inspiration from the theatre or society ladies, led her to found Tobe & Associates in 1927 in New York (Jabenis, 1972). The organisation provided weekly reports, sketches and fabric swatches for clients to develop further ideas and collections from. Fate also conspired to assist the new company, with the advent of the Depression and the Wall Street Crash in 1929. It is well documented that in times of recession, consumer spending on clothing reduces (Sproles, 1979, Easey, 2009) and so Coller Davies found that the retailers were eager to explore any medium that stimulated sales or gave them a competitive advantage at the time.

The world of colour consumption was also experiencing a paradigm shift in the USA of the 1920's, which undoubtedly assisted The Tobe Report and its' influence on retailing during the period. Cars were being sold in a variety of colours for the first time, and in 1927 the Ford company began production of the Model A, the first of its cars to be available in colour (Eskilson, 2002). Colour had begun to seep into consumers lives as never before, and demanded a new approach to colour development and marketing.

Outwardly, many methods of disseminating information have changed little since Tobe's day; reports are still developed, books featuring sketches and fabric swatches are published, clients are briefed on future trends, although the work is now presented seasonally rather than weekly, and the cycle continues year on year. The company still exists in New York today, producing The Tobe Report.

4.2.3 Post World War II

The fashion industry experienced another hiatus in Europe during the Second World War, when consumers found they had to 'make do and mend', effectively recycling old garments in innovative ways. At this time fashion was more a functional industry rather than fashionable, but the end of the war not only brought liberation to many occupied nations, but also to the fashion forecasting industry, which experienced another growth phase. This was in part due to the feel good factor experienced after the end of the war, increasing consumer confidence, and demographic changes experienced later in the 1950's. Christian Dior's New Look in 1947 provoked a fashion frenzy of rapidly change seasonal fashion trends, the A-line, the H-line, each in turn determining a new fashion trend that must be followed. The rejuvenated Parisian fashion industry generated a range of services for the global fashion industry to support the demand for its concepts, and fashion forecasting was born in Paris.

At the same time as Dior unveiled his new look in Paris, Monsieur Carlin started his trend agency, which remains one of the most successful trend forecast agencies in the world, Carlin International, the first trend agency in Europe. It started much in the same way as Tobe and Associates in New York, providing reports to retailers on the latest ideas of how to merchandise, coordinate and develop demand from consumers.

In the USA by the 1950's other department stores had decided to develop their own trend forecasting service in-house. Drayton's Department store had a small group of staff who analysed trends and developed exclusive apparel and home furnishings lines from them (Brannon, 2000). The sudden explosion of youth culture in the Fifties, higher standards of living and confidence in the economy led to an increased emphasis on new and youthful fashions, changing constantly, diverse and generating increased sales, and an increased fashion awareness amongst the teenagers of the day.

By the Sixties, youth culture and rapidly changing, colourful fashions were well-established, and two of the key industry names in forecasting were also established in Europe and the USA. The Colour Marketing Group (CMG) was established in 1962; now based in Alexandria, Virginia, it works closely with CAUS and has over 1300 American members (Hope & Walch, 1990:34). Promostyl was established in 1967 in Paris, initially focusing mainly on the textile sector, but later developing to encompass all areas of fashion apparel and accessories; Peclers Paris was formed in 1969 by Dominique Peclers who focused the company strongly on colour and textiles for fashion, soon developing an extensive portfolio for fashion and accessories in all market sectors. Peclers is now owned by The Fitch Group and is a truly globalised organisation.

In a press release for one of the most influential colour and fabric trade shows, Parisian Premiere Vision in February 2004, Promostyl credited itself on the inception of the trend book in the 1970's, although it is difficult to substantiate this claim as other, similar

publications had been seen as early as Tobe's 1927 report and Carlin's services from the late 1940's. The definition of exactly what a trend book might comprise is also a matter for debate. Undoubtedly they were one of the pioneers of trend forecasting, providing eclectic forecasts and identifying new methods of information gathering, and whom Raymond (2001:224) cites as eschewing the 'instinct-only approach to trend analysis in favour of a more scientific, and less problematic, methodology of making lifestyle predictions'. Promostyl and Peclers are two of the major names in trend forecasting who are still in existence today and part of the dominant group of major trend forecasters worldwide.

4.2.4 The 1970s and 80s Boom

Many of the initial trend reports and publications during the early period were basic by contemporary standards, predominantly featuring line drawings and very little colour. Often the forecasters would present an overview of the key catwalk or street styles of the time, as the communications infrastructure of the period meant most had to wait for the major publications to appear before knowing what the seasonal catwalk trends looked like. Providing sketches or photographs in a monthly report was a useful tool for the designer who was unable to attend the international designer shows. For Ros Hibbert, and trend consultant at UK based Line, the fashion forecasting industry appeared very different during the 1970s, as discussed in an interview with the author in 2008.

'It was very dictatorial in the 1970's and people tended to believe your forecasts as there was very little else other than the fibre companies. There was not as much diversification as there is today with all the niche markets.'

(Hibbert, 2008)

Hibbert's view is supported by McKelvey and Munslow (2008:1) who suggest:

'There has been a shift from the 1960s onwards in the dominance of single fashion trends to a more pluralistic approach, mirroring the expansion of mass communication and in turn the increasing sophistication of the consumer.'

During the 1980s when the forecasting industry began to be recognised as a useful design and marketing tool, and the pluralism suggested by McKelvey and Munslow (2008) began to develop further, the publications became increasingly sophisticated. In Figure 4.1: New York based forecasters Here & There present a trend sketch from 1981; an example of the images usually presented around the time is reproduced, showing influences from Japanese and European designers. The line drawings are detailed but basic, and immediately evoke a specific fashion illustration style of the period. Although detailed, it remains difficult to understand what fabrics or colours are being portrayed by the sketches.

Figure 4-1: Here & There trend sketch from 1981

There were a number of new players entering the industry in the late 1970's and early 1980's, including another Paris-based forecaster, Nelly Rodi. Rodi had been developing trends with world renowned colour expert Li Edelkoort, for Comite International de la Mode (CIM) in 1973, eventually establishing her own trend agency in 1985, and experienced many of the changes in the industry over thirty years first hand. She maintains that in the 1970's consumer needs were never really taken into consideration; there was less emphasis on lifestyles, less perceptible technological developments in textiles. The Eighties were more prescriptive, according to Rodi, with key brands imposing a head to toe style on the consumer as the era of the super designer brand was born (Merrett, 1996).

It was in the late 1970s and early 1980s that a many of these key designer brands emerged from the US, such as Calvin Klein, Halston and Donna Karan, becoming highly influential in the expanding the desire for designer labels amongst consumers. One key trend publication of the late 1970s and early 80s was the American IM Report, which featured one of Calvin Klein's runway pieces in its winter 1978 trend book. Interestingly, it also began to feature fabric swatches denoting colour in addition to fabric type, as can be seen in Figure 4.2: IM Report Winter 1978 trend book which still retains a contemporary look. Having the colour swatches in fabric, not paper, was a welcome addition to the report

and helped instigate a style amongst forecasting companies for including fabric swatches in their future publications, establishing a benchmark for the 1980s.

Figure 4-2: IM Report Winter 1978 trend book

In the UK Deryck Healy International were established in the 1970's, becoming the major UK trend agency in the 1980s, followed by Design Intelligence and Nigel French in the 1980's; in the US Here & There and newly formed The Fashion Service; all could see potential markets for their own particular brand of trend analysis and prediction.

Figure 4-3: Deryck Healy Brochure cover 1970's

2.5 The 1990's Onwards

During the 1990's fashion forecasting witnessed worldwide growth during as forecasting professionals became prominent industry advisors (Brannon, 2000: 20). A number of key individuals and organisation developed strong reputations for accurate advance predictions of fashion, colour, consumer and lifestyle trends, developed for individual clients or published in trend forecasting books, which had developed into a highly stylised version of the original. As seen in Fig 4.4 below, Design Intelligence Autumn Winter 1995/96. The three images are taken from one of their themes that season, Eco Millennium, and feature a concept board, garment ideas and a colour palette, all far more elaborate than the earlier trend books illustrated in this chapter. It was not simply the presentation which had changed; the marketing of the products had also changed to a 'must-have' element of the design and retail reference library.

Figure 4-4: Design Intelligence Menswear Autumn Winter 1995/96: Eco Millennium

The traditionally accepted movement of fashion via the trickle up, down or across methods became blurred within an increasingly complex contemporary social system, and were no longer acceptable as drivers of fashion change in the current fashion climate (Brannon, 2000). The apparel industry was also under pressure to move away from the traditional fashion seasons of Autumn/Winter and Spring/Summer, as consumers' lifestyles began to change (Jackson 2001), and to adopt as many as 12 'seasons' during the year. Clearly this demanded more information if the retailers wanted to maximise each buying opportunity.

Within the same period ironically the trend prediction industry saw substantial rationalisation, with several large-scale organisations establishing market dominance including Peclers and Promostyl. In response, an increasingly competitive sector witnessed the introduction of on-line forecasting organisations, with considerably lower

overheads than the traditional print media, to challenge the established organisations. Worth Global Style Network, (WGSN), now owned by publishing house Emap, was one of the new generation forecasters founded in 1997, able to satisfy on-line customer demands for immediate information by covering the latest fashion and fabric shows as they happened, via their web site, www.wgsn.com. Clients downloaded or printed the relevant information instantly, rather than waiting for a summary from more traditional forecasting companies. Many well respected and previously profitable British forecasting companies ceased trading during the period as the global economy changed and the fashion and textile industries economised. Deryck Healy International was the first to close in the mid 1980s, followed by Design Intelligence and Nigel French in the late 1990s, and Index trend forecasters soon followed.

As retailers came under extreme pressure from their increasingly fashion-aware customers to replicate key catwalk looks within weeks at a fraction of the price, on-line organisations such as WGSN were able to gain immediate competitive advantage over terrestrial counterparts.

Since the degree of longevity in fashion has been replaced by constant change and overlapping, concurrent and intertwined looks (Armstrong, 2000), trend forecasters have been required to move with the pace of change, or risk potential business losses.

"Two years ago it took somewhere between six months to a year and a half for a trend to move. Now because of the Internet trends can move through different cultures within fifteen seconds" says Dee Dee Gordon, whose trend consulting company decided to launch an on-line service, Look-Look.com, after realising that their quarterly report was not always relevant anymore.'

(D'Innocenzio, 2000: 6)

Such change has been further fuelled by the increasing numbers of fashion innovators, members of the general public who have no connection with the industry, other than their willingness to purchase new fashions when they first appear in the marketplace (Goldsmith et al, 1999). Today there are hundreds of forecasters around the globe, each providing essentially the same prediction service for the fashion and textile industry. Figure 4.8 illustrates how many of the key players publishing reports or trend books within the industry focus specifically on colour. An additional factor in recent years may be attributed to the Quick Response systems which have been introduced 'to provide a competitive advantage through improved productivity, performance, business expansion and reorganisation.' (Kim & Johnson, 2009:269)

Based on the research data, forecasters appear to be the conduits channeling new ideas and new trends and synthesising the information in to fashion market and design friendly

formats that will meet their client's objectives – to have accurate colour information ahead of the seasons, to inform their buying and manufacturing decisions.

4.3 Cultural Drivers

The development of fashion and colour trend forecasting and its associated industries was a phenomenon of the Twentieth Century, which appears to show no sign of abating in the Twenty First Century. Forecasters, whose role it is to predict seasonal fashion and colour trends months, or years in advance, have influenced a wide assortment of consumer products, from cosmetics to cars, and the predicted trends are now an important tool in aiding marketing practitioners to determine products colours that will appeal to consumers (Grossman & Wisenblit, 1999).

The industry is dominated by a handful of key players. These include commercial forecasters such as Peclers Paris, Promostyl and Carlin International, all Paris-based, but with offices and agents worldwide. Moreover it could be argued that the reason most of the high profile, largest forecasters are French is due to the hegemony of Paris haute couture during the early days of fashion, the late nineteenth and early twentieth century. Couturiers such as Worth, Vionnet, Carven, Dior and Chanel placed Paris firmly on the map as the epicentre of fashion trends many years before the inception of fashion forecasting.

Numerous smaller companies and individuals who also provide trend forecast information and services ensure the industry is comprehensively represented at all business and market levels. A table of the key forecasters and their specialist business areas is provided in Figure 4.8: Forecasters Mapping. However, this is by no means an exhaustive list as new companies and consultancies are constantly emerging. The individual consultants, futurists, style agencies and cool hunters who now populate the industry have not been included as they often do not publish trend books, or only publish generic trends, not specific to fashion, or necessarily to colour.

Much forecasting is done using a variety of creative tools and techniques developed by individuals or organisations to accurately predict the transition of colours from one season to the next. At The British Textile Colour Group (BTCG), their members include representatives from the major UK retailers, trend forecasters and individual colour consultants, or cool hunters, Each introduces their own thoughts of what a specific season will be influenced by, usually two years in advance of the season. Members may present generic lifestyle concepts, images, or completed colour trend boards, all of which are subsequently distilled in to a limited number of colour stores or themes, usually four or five. The process is very similar to that used by British colour forecasters, The Mix (see Chapter 6), where their panel of international experts present their colour thoughts for the season two years in advance. The meeting of The Mix panel usually occurs in September for a Spring/Summer season two years hence, and March for the following Autumn/Winter

season. From personal experience with The Mix, it is relevant to note that despite the divergent cultures and markets the experts experience,, there is a considerable amount of consensus at the initial presentation, with most panel members showing convergent influences and colours. This could be due to the increasing homogeneity of information available though online sources, popular culture, and major exhibitions or through cool hunters, constantly travelling, looking for the next new trend.

Is this model sustainable when fast fashion is being adopted by retailers across the globe? Rickman and Cosenza (2007:608) believe current methods of fashion trend forecasting are not, and suggest that using repeated cycles, perhaps of colour, could be the answer.

'The current methods of forecasting cannot keep pace with the changing dynamics of the marketplace – The company that can tap the continual flow of data/information, contrast it with a stored set of information from the past, and adjust based on repeated cycles, will have the best insight into the lingering trend, changing trend or dynamic trend.'

Lin and Johnson (2010:360) believe it is imperative:

'To trace the future fashion colour trend is a crucial key issue in the textile industry.'

The head of French forecasters Carlin's international contacts division, Luc-Dominique Demettre, explained their position and outlined three types of trends:

"You can say that the world of modern fashion consists mainly of three trend types. There are very long-term megatrends extending over many years, and short-term trends that vary season by season. Then there are medium-term trends which lie between these two extremes, which are both in progress and changing. It is here, in these medium-term trends, that our strength lies."

(Kinnarps, 2005 :4)

The macro or long term trends described by Demettre suggest there may be some stability in the form of basic trends, or core products, colour and themes, as well as the more transient short-term high fashion trends. These concepts will be discussed further in Chapter 8, section 8.2, seasonal colour progression, which also considers cyclical colour trends and whether these could be used to develop more accurate forecasts as Rickman and Cosenza (2007) advocate. Further suggestions toward adopting a different approach to the traditional trend forecasting methodologies may be required in response to fast fashion, one that eschews the rigid formulaic approach to trend gathering, visiting trade shows, catwalk shows, past trends and comparative shopping, in favour of a more research orientated method, (Raymond, 2001, Popcorn, 2000). Whatever the viewpoint, it is clear that in today's rapidly changing fashion industry, accuracy in predicting future trends is vitally important. The core business of devising and promoting colour trends is

one that many believe is essential to survival in the increasingly competitive marketplace (Brannon, 2000, Porter, 1994, Linton, 1994).

In order to ascertain where the need for fashion and colour trend forecasting was first established, it is essential to consider the cultural drivers for change, and the development of the fashion markets in the early part of the Twentieth Century. It has already been established that the business began in the USA in response to the outbreak of World War 1 and the virtual closure of influential Paris fashion houses during that period. In later years, the forecasting of colours, fabrics and garment styles expanded worldwide into the current industry format.

4.3.1 Apps, Blogs and the Future of Trend Forecasting

Digital and online solutions are increasingly available featuring a broad range of information from street style to live catwalk report, and will undoubtedly continue to be used despite the inherent problems of viewing colour onscreen from a light emitting device. A physical yarn or fabric swatch is always preferable when deciding which colours work best together due to the accurate absorption of colour in comparison with a light emitting device such as a computer monitor (Guerin, 2005, Brannon, 2000). Traditional forecasters have begun to adopt some of the new technologies on offer to work in synergy with their traditional trend books, thus providing something for everyone.

Undoubtedly online trend information providers are changing the nature and use of forecasting, providing a different range of services than previously. It is not simply the immediacy of the online formats, but also the rapid interpretation of global trends, distilled for customers from agents across the globe, and the inherent economies of scale associated with the information gathering process. Instead of sending numerous teams or individuals to scout information and perform comparative shopping around the world, the more cost effective approach is to use an agency with global staff to do this for you. There are many providers of online information today – perhaps the best known, and certainly one of the inceptors, was the British based Worth Global Style Network (WGSN). Others such as the American service Stylesight have been established more recently in 2008, adopting similar principles to WGSN; they report from international catwalk and trade shows, influential cities, exhibitions and key influential events. Stylesight provide free, immediate overviews of major international catwalk shows, regular webinars highlighting new trends, daily blogs, and in early 2011 launched a Korean version of the web service. In a promotional brochure entitled Illuminate from 2010, they describe themselves as:

'The world's premier online provider of inspiration and product development tools uses cutting edge technology to define and disseminate trends that influence design.'

Online blogs, such as those featured on In:color and Colour Lovers websites also bring immediate reaction and daily views on colour related to fashion, interiors and product design, and can be a valuable addition to the forecasters range of information gathering.

Other newer sources include applications for mobile phones such as those provided by Trendtracker by Trendstop, and Sartoialist, which users can download to their phones, gain updates, photos and trends direct from the provider as they happen. This is seen as potentially the big way forward, mobile communications providing immediate access to information away from the constraints of the keyboard, using wifi technology.

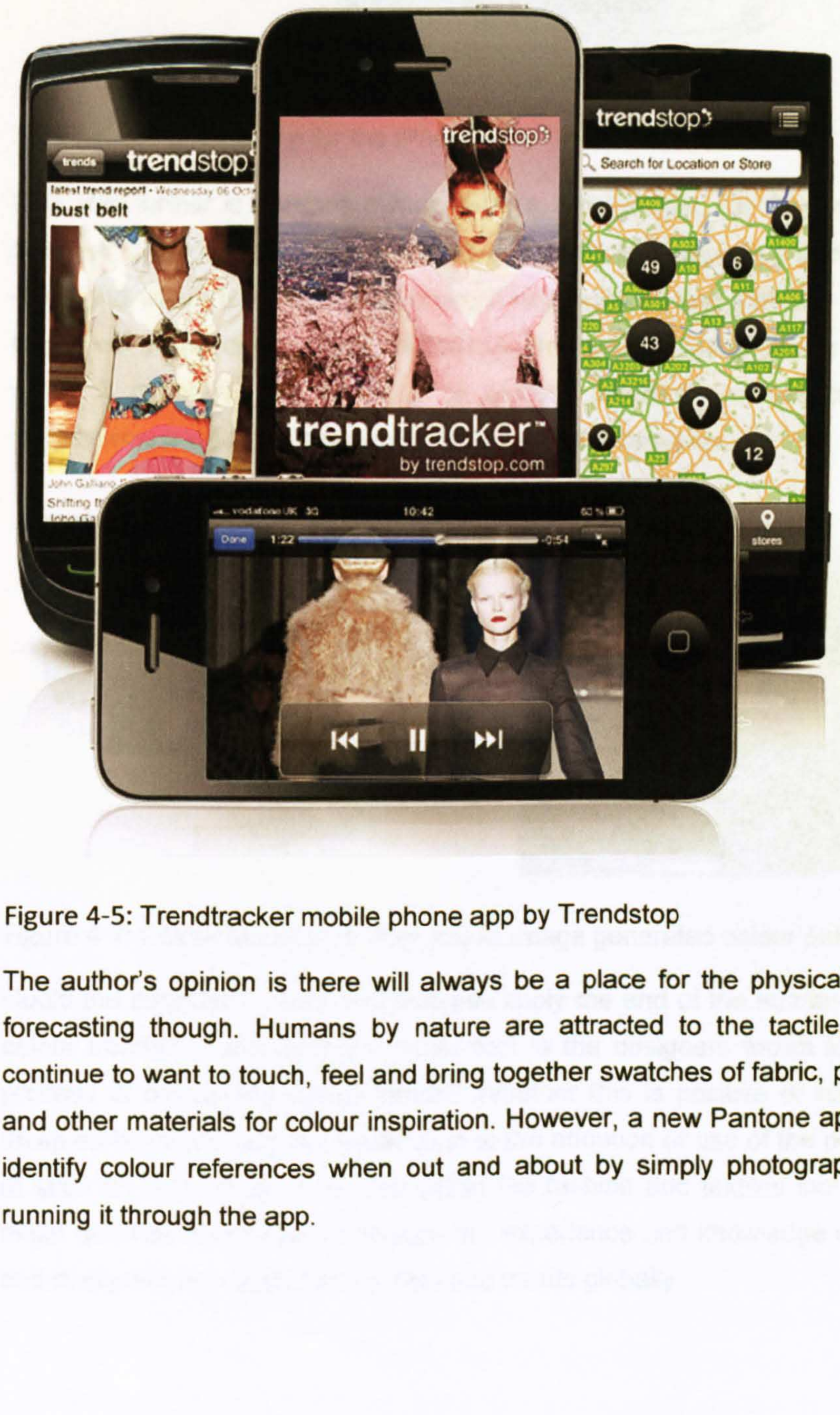


Figure 4-5: Trendtracker mobile phone app by Trendstop

The author's opinion is there will always be a place for the physical elements of colour forecasting though. Humans by nature are attracted to the tactile, and will no doubt continue to want to touch, feel and bring together swatches of fabric, pieces of yarn, paper and other materials for colour inspiration. However, a new Pantone app allows the user to identify colour references when out and about by simply photographing an object and running it through the app.

Figure 4-6: Pantone app for the iPhone

One step further is Pantone owner, X-rite's, new gadget, the Colour Munki, which allows the user to place the Colour Munki on any surface, irrespective of the number of colours contained within the surface, whereby it will separate and Pantone reference all colours contained in the object. Such technology immediately generates a colour palette which whilst it might not be adhering to current predicted colours or fashion trends, is nonetheless a valuable, and rapid resource for the designer.

Figure 4-7: Colour Munki by X-Rite and its image generated colour palette

Could the adoption of such technologies imply the end of the human input in determining colour trends? Is this simply another tool in the designers toolkit to assist them in the process of developing colour trends? Whether this is positive or negative is unclear at these early stages, with no research in to the adoption or use of the new technologies and at such an early stage in its use within the fashion and textiles industry, perhaps some might question that it cannot replace the experience and knowledge of colour forecasters and designers who track the markets and trends globally.

4.4 *Fast Fashion Influences on Dissemination of Trends*

It has been established that colour forecasting is an activity which aims to identify and predict advance colour trends for manufacturing industries and retailers in order to allow clients to gain a competitive advantage, typically developed and marketed up to two years in advance of the season. Colour forecasts, or predictions allow suppliers, manufacturers and retailers to identify new directional colours or colour groups which are used to update existing basic, or core, colour palettes in the development of new product ranges. Change is essential in the fashion industry to promote sales growth and consumer interest. It has been done so well that many consumers have come to expect an ever increasing pace of change from the industry; the customer, ironically now appears to be intrinsically driving the ever increasing turnover of ideas (Solomon, 1994, Brannon, 2000, Bruce & Daly 2006, Franck, 2000), demanding a new look each time they visit a store, new directions every month, rather than the seasonal changes previously experienced in the fashion industry. Consequently, the concept of fast fashion was developed by the Spanish retailer Zara, part of the Inditex Group, working on a six to eight week turnaround on key product lines from concept to delivery. The plurality of concepts and trends within fashion was highlighted by respected fashion journalist Lisa Armstrong (2000:149).

'Fashion 2000: constant change and a multiplicity of overlapping, concurrent, intertwined looks is how it works.'

For the forecasters, continuously analysing a variety of shifting trends experienced by an organisation appears to contribute to their development of future colour trends. Their research does also consider fast fashion, and the impact it has had on trends and forecasting in general. Janet Holbrook, UK agent for Peclers Paris, acknowledged the impact of fast fashion in an interview for the research in London in February 2006:

'In the old days you would go to the shows, pick out your colours for the season and wait for them to arrive. Nowadays it's much faster than that and you can see the international collections immediately. It's only in the last five or six years that we've been able to do that. Before, it would be four or five months later before anyone would see them in the shops. Basically everything has speeded up. I think the big change was when Zara started. They cut the lead times down to five or six weeks.'

(Holbrook, 2006)

So how are the forecasters reacting to the fast fashion phenomenon? Holbrook (2006) answered the question in respect to Peclers Paris.

'You have to have starting points... the yarns and the fabrics – the fabric manufacturers and spinners right at the beginning of the process, they need to be informed....start quite early. Then there are the trends we can see coming in quite early, the real trick is knowing what to look for and when to know what is coming in. What people want is

creativity and that's what we are giving them. The Peclers books give you enough room for maneuver so you're not told just to do this or that. We say these are the ideas and you take it on.'

Other forecasters have adopted a slightly different response to the increasing pace of product development in fashion and textiles, and something which they hope will complement the demands of fast fashion. French Forecasters Carlin work differently approach to Peclers. Their UK agent Alison Hughes outlined how Carlin was responding to the changes during an interview for the research in London in October 2007.

'WGSN changed the landscape with online daily trends, and books are seen as being of secondary importance now. Carlin now have some web based add ons mid season, such as the women's update in three parts; from the catwalk, a last minute guide, key colours and fabrics. The online service costs clients an additional £1000 for the season and has not proved as popular as initially hoped.'

At British retailer Marks and Spencer, Joanna Bowring used to work as the womenswear fabric coordinator, and experienced some dramatic changes in the traditional critical path timescales. She explained these during an interview in London in April 2008 with the author:

'In 2001 the new womenswear creative director wanted to use the colours from the catwalks, not develop our own trends. As a result, things began to blur, and as the catwalks were only 6 months ahead of the season, the timings were too tight and it just did not work. Pitti Filati (and Italian yarn trade show) had previously been 18 months ahead of the seasons in July, but now they were looking at taking the colours and getting merchandise in store within 6 weeks!'

Not every retailer has adopted fast fashion, some use it only for a fraction of their entire range, but it has obviously impacted upon the forecasters and how they present their trend information, in particular their colour palettes, using in season updates, online strategies and focusing on their creativity, developing new colour combinations and finishes. As Ekwall et al (2006) found, new, influential trends can be quickly and accurately interpreted using fast fashion princpiples, but if a product does not reach the market on time, it will not necessarily sell. Clearly, Zara's influence on fast fashion cannot be underestimated, but there is evidence that the colour forecasters, and those involved early in the colour development stages of clothing manufacture, such as the yarn spinners and fabric mills, are being as responsive as the forecasters, but are responding not necessarily by holding considerable stocks of greige yarn and fabrics, ready to be dyed quickly, but again by being creative in what they are offering clients. New colours, new treatments which affect how a colour is perceived, perhaps with a more lustrous or reflective finish, or a softer, blurred edge. Counterbalancing the fast fashion movement is

something which the trend forecasters are working with the fashion supply chain on in earnest

4.5 Forecasters Mapping

Some of the key forecasters involved in colour prediction today have been mapped, juxtaposed with smaller, more individualistic companies also providing colour trend information to the market. The results of this can be seen in Fig. 4.8. Forecasters Mapping, and illustrates the large number of key organisations involved in the industry. The mapping is by no means exhaustive; specific limiting criteria were used to select the organisations included. Only those forecasters who publish trend information in hard copy were selected, with the exception of WGSN, one of the original, and now the dominant online forecaster. However, this is a relatively small amount when considering the vast and dynamic numbers of individuals, colour, style and trend consultants, who also provide information to the industry based on specific niche markets, demographics or based on geographic location. Such independents are difficult to assess, many do not publicise their businesses in the traditional way, using word of mouth instead. They use unconventional marketing approaches and may only work for one company, never publishing any of their colour trend information in the traditionally accepted formats. Therefore, any mapping of the industry must be confined to major players, who are not quite as subject to flux in the market. WGSN were arguably the first of the new generation of online forecasters to emerge in the late 1990's and have been providing online information through their website www.wgsn.com ever since to major designers, manufacturers, retailers and design institutions worldwide. For that reason they were included in the overall mapping of the industry, having established themselves as a major force in trend reporting and forecasting over the preceding two decades. Jane Kellock, who is now head of trend research at WGSN and has been with the company since 2001 noted in an interview with the author in May 2008:

'The immediacy of the Internet delivery medium allows us to work faster and fast track colours as and when they are required..... We have driven things forward now in terms of trend development.'

Many new services emerged from the development of the internet, and the increasing ease of online provision. The profusion of individuals offering online consultancy, style tips, catwalk reports and other services and the dynamic environment in which they operate makes analysis of such provision extremely difficult. Consequently, only the major, established players in the online medium, such as WGSN, have been examined in any detail. However, all the publishers of trend books have an online presence, if not the full provision of their books online.

Online blogs, such as those featured on the In:color and Colour Lovers websites also bring immediate reaction and daily views on colour related to fashion, interiors and product design, and can be an interesting addition to the colour forecasters range of information gathering. Alternative, contemporary sources such as mobile phone apps provided by Trendstop, Sartorialist and others, which users can download to their phones, gain updates, photos and trends direct from the provider as they happen, but these were not included in the mapping.

name	based	colour	fashion	status	market focus	year est.
A + A	UK			niche	M & I	1988
Bloc Note	France			major	W,K,M & Sp	1985
Carlin	France			key	All	1947
Dcipher	USA			minor	C, W & M	1980s
Design Options	USA				C	1980
Fashion Box	Italy				K, Ts	1985
Global Influences	UK				M & W	
Here & There	USA				All	1970s
Hue Point	USA				C	1980s
ICA - Int'l Colour Auth	UK				C	1972
Instore	UK				K,W & M	
Jenkins	UK				W & C	
London Eye	UK				W & C	
Milou Ket	Holland				C, W & In	1980
Mud Pie	UK				K & C	1993
Nelly Rodi	France				All	1970s
Orrizoni	Italy				C	
Pantone	USA				C	
Peclers	France				All	1970
Promostyl	France				All	1973

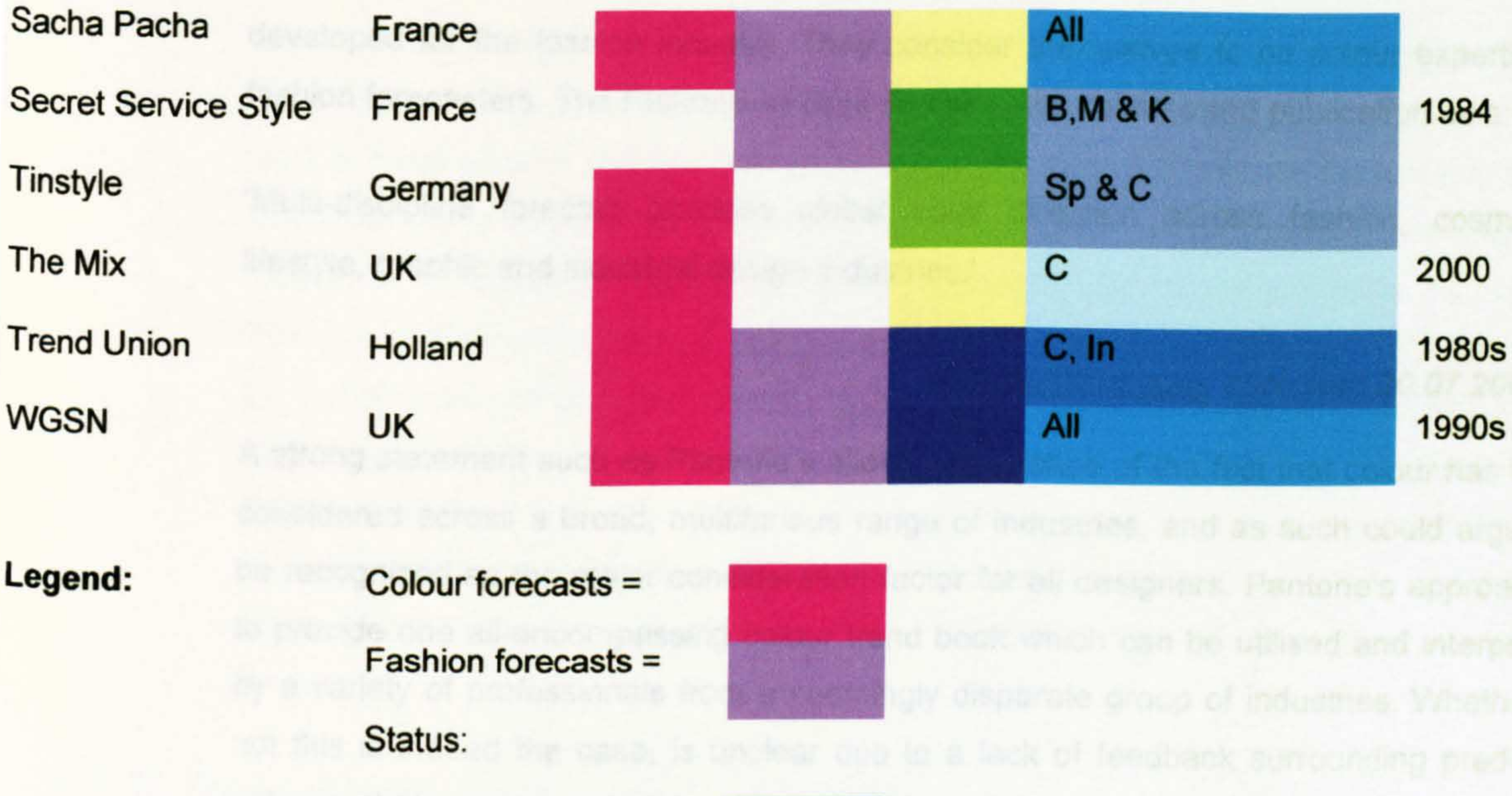


Figure 4-8: Forecasters Mapping.

By mapping the key forecasters producing advanced seasonal colour information for the industry, it can easily be clarified how specialist some areas truly are. Quickly identified were a number of colour-only forecasters such as The ICA, The Mix, Pantone and Hue Point. Others offer colour trends alongside a range of mainstream trend areas, such as fashion or interiors, but not an exclusive colour trend book above all else with no additional publications to support the colour predictions. Over 73%, or nearly three quarters of the forecasters identified offered separate colour publications, indicating the importance of colour in the business, yet only 15% actually specialised in only colour. The low proportion of colour only specialists could be in part due to the large number of trend agencies who provide colour information in parallel with their remaining trend books. Publications by Pantone and The Mix, amongst others, do not include any fashion garment information in tandem with their colour forecasts, although the colours have been

developed for the fashion industry. They consider themselves to be colour experts, not fashion forecasters. The Pantone website describes its colour trend publication as a:

'Multi-discipline forecast provides global color direction across fashion, cosmetics, lifestyle, graphic and industrial design industries.'

(www.pantone.com, accessed 20.07.2009)

A strong statement such as Pantone's allows cognisance of the fact that colour has to be considered across a broad, multifarious range of industries, and as such could arguably be recognised as the major consideration factor for all designers. Pantone's approach is to provide one all-encompassing colour trend book which can be utilised and interpreted by a variety of professionals from a seemingly disparate group of industries. Whether or not this is indeed the case, is unclear due to a lack of feedback surrounding predicted colours, their use by industry, and their ultimate accuracy, which pervades the colour forecasting industry. Very little information was found throughout the course of the study to suggest that the forecasters compare their predicted trends with the actual trends available in store to the consumer; two years after the seasonal colours are initially presented through their publications and trend briefings.

Other organisations identified as being the large, key players, dominant in the industry include four Paris-based companies, Peclers, Promostyl, Carlin and Nelly Rodi. Between them they have arguably established hegemony within the industry, providing highly commercial trend publications which are sold via a network of global agents.

4.6 *Common Forecast Formats*

The research has indicated there are four major methods by which forecasting information is disseminated to clients by the forecasters;

- Trend publications (including CDs)
- Trend seminars
- Online and digital services
- Individual client trend consultancy

The plurality of formats allows users of trend forecasting information to select one one, or all of the above methods for gathering information for the coming season, the choice is often budget dependent. A decade ago Marks & Spencer, Next and Selfridges were asked how they used forecasting information, and each responded differently. Next would rather purchase and use trend publications instead of employing a designer; Marks & Spencer used their designers primarily; Selfridges thought prediction packages were

expensive and were not a fundamental requirement for sales success (Hipsey, 1995). By 2005 Next did not purchase forecasting information but employed trend consultants to work in conjunction with them (Hansford, 2005); Marks & Spencer were employing colour forecaster Anna Starmer as a colourist for their lingerie ranges. Joanna Bowring, who worked for Courtaulds Textiles as Design Director, then subsequently at Marks and Spencer as Fabric Coordinator, used to bring the influential forecaster, Li Edelkoort into the businesses one day each season to talk about trends, concepts and colours, and to stimulate the design and colour teams at the beginning of their colour development cycle. Practices obviously change within industry according to the market changes and those in charge of the colour and trend development process. Perhaps the changes at Next and Marks and Spencer are nothing more than indicative of such changes in personnel and processes.

4.6.1 Trend Books

Trend information is presented in a variety of formats to clients. The majority of the major trend forecasting organisations publish trend books illustrating their key concepts and providing colour swatches for the user's reference (see Fig 4.8, Forecasters Mapping). Such publications are often expensive, approximately £500 each book, although the larger well known names, such as Peclers Paris and Promostyl, can charge up to £1200 per edition. Supplemental publications can keep clients up to date as the season progesses, and are often linked to the main seasonal book.

Commercial forecasters usually publish their seasonal trend information twice a year with additional updates. Each of the major forecasting agencies usually covers a minimum of nine industry segments, including mens, womens and childrens wear, plus lingerie, sportswear, knit, colour and fabric directions, ensuring books or CD's are being produced constantly throughout the year. Several companies specialise in specific aspects of trend prediction, such as Global Colour Research, the UK based colour specialists, who publish The Mix colour trend book. The key areas of interest for the fashion and textile industry can be divided into four major segmented areas:

- Womenswear
- Menswear
- Childrenswear
- Colour

Segmenting the markets in this manner allows agencies and their clients to fully focus on specific seasonal design collections, which are often subdivided. Promostyl produces fifteen different 'trendbooks' per season, which include:

- Women
- Ultimates (young women)
- Men
- Children
- Junior
- Colour
- Fabrics
- Influences (lifestyle & culture)
- Baby-layette
- Sport & Street
- Lingerie
- Shoes
- Swimwear
- Home

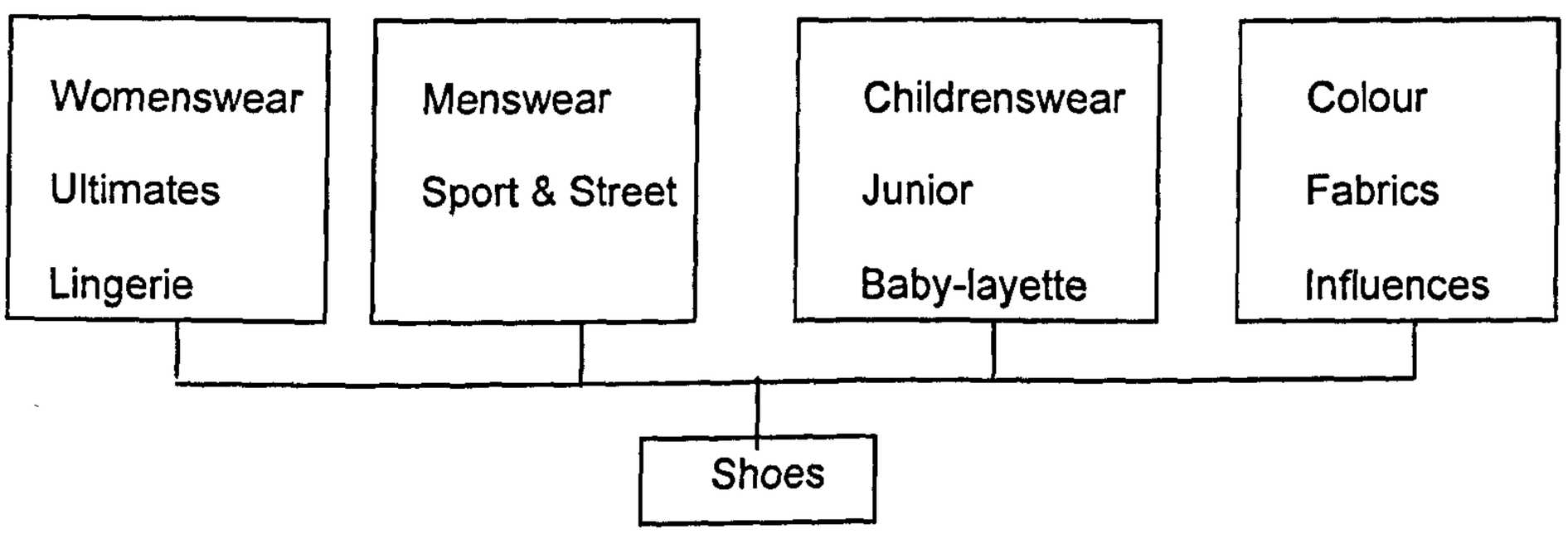


Figure 4-9:. Forecasters key market segments

These can be further grouped in to the four key product areas, with home sitting outside the fashion product area completely.

Each publication is released at different periods during the year, usually with one issue for the summer season, and one for winter. The trend books represent the majority of the

turnover for many forecasting companies; Promostyl attributed 60% of its 8 million Euro turnover in 2003 to trend books in its January 2004 press release.

4.6.2 Trend Seminars

Most of the major companies also deliver trend seminars, for example Promostyl's UK office has presented their seasonal trends at London College of Fashion; the price for attendance in 2005 was £100 per person. It usually comprises a slide presentation with a leaflet explaining the major concepts behind the seasonal trends, and is given after the books are published. Often this will be repeated many times each season across the world by local agents, with private presentations for subscribers at trade shows such as Premiere Vision in Paris twice a year. There are also some forecasting magazines, but these do not always provide in depth information.

Figure 4-10: Advert for a 2010 trend seminar by forecasters Mudpie

4.6.3 Consultants

Trend consultancy is becoming increasingly widespread and helps organisations by targeting their specific market segment, customer profile and product range. However, a tailor-made forecast from a consultant can be more expensive than purchasing and interpreting trends in-house. Consultants are able to 'work with brands that want a solution that is unique, copyrightable and relevant to their brand DNA' according to Raymond (2010).

4.6.4 Online and Digital Formats

Most forecasters have their own website, but the information regarding seasonal colour trends from such sites are variable. Worth Global Style Network (WGSN) is a subscription only online trend service, which has an equivalent of a complete trend book online, plus additional information such as city guides, reports from catwalk shows, festivals and stores around the world. As discussed earlier in the chapter, Stylesight has taken the WGSN model and developed it further, allowing substantial free content without subscription, and an extended service to those who chose to subscribe including a personalized design development area. The majority of forecasters use their websites as an advertising medium, with little information available for the general public to view, although there are instances currently where companies have provided bespoke online update services at additional cost to their clients, for example Carlin, who have a section specifically providing more mid season information regarding a variety of concepts including colour. It appears the traditional forecasters, who are adept at publishing trend books, are still one step behind the dedicated online trend information providers.

4.6.5 Trade Associations and Trade Shows

Not all trend information is high cost; it is possible to glean a considerable amount of free colour, fabric and styling predictions from specialist trade associations, such as Cotton Incorporated or the International Wool Secretariat (IWS). The British Textile Colour Group (BTCG) founded in 1976 is recognised by Intercolour, the global colour group, as being the official British representative at their global meetings, where CAUS is also a member. Cotton Incorporated is an American trade association, as the name suggests, primarily targeting cotton users and with offices throughout the US, in China, Mexico and Japan. It too produces a colour prediction each season for the industry, as illustrated in Fig 4.11.

Figure 4-11: Cotton Incorporated Spring/Summer 2002 Colour Card.

Major international trade fairs such as Premiere Vision in Paris, Pitti Filati in Florence or Interstoff Asia in Hong Kong feature pavilions promoting the latest colour, yarn, garment or fabric trends which the visitor can make notes on, or in some cases, purchase copies of the trend materials available. Rinallo and Golfetto (2006:861) describe Premiere Vision as:

'The most important trade fair in the clothing fabric industry. Its origins date back to 1973; in 1976 the weavers decided to meet together before the salon to propose a synthesis of seasonal colour and fabric trends, paving the way for a coherence in the textile offer.'

Trade Associations often publish excellent colour cards, hold free trend seminars for their members, and provide trend information services where members can obtain a more personalised, consultancy type experience. These services have been in decline since the late 1980's; the service is usually expensive to maintain, as agents need to travel the world constantly to monitor lifestyle trends and fashion movements likely to influence their trend predictions, publications or colour cards are subsequently compiled and printed, and representatives sent around the world to hold seminars to disseminate the information. It is unclear how much longer such a free model will be sustainable.

4.7 Summary

It is apparent that trend forecasting began almost accidentally when the Parisian fashion houses were closed during World War One, and strengthened during the Great Depression and World War Two when Paris was again effectively closed for business and retailers were keen to support their diminishing sales. The US in particular took advantage of the situation, establishing colour councils who published the first forecast in 1917 and generating commercial trend experts such as Tobe and Associates. The first commercial trend publications were created by Tobe Coller Davies, and based in New York; the company remain the oldest surviving trend agency in the world.

Paris established its global fashion influence again after World War Two, despite the development of trend reports and colour forecasts in the US, and that more successful trend forecasters based themselves in the city in the following years, subsequently strengthened Paris's reputation as a global fashion centre, one which it has retained despite the death of the founders of major couture houses, such as Christian Dior, Hubert Givenchy, Coco Chanel and Yves Saint Laurent.

The UK trend industry also flourished in the 1970's and 80's , but when the fashion and textile industry worldwide experienced substantial decline and most manufacturing moved to low cost offshore sites during the 1990's, the UK forecasting industry rapidly declined too. Major, influential names including the pioneering Deryck Healy International, which had established itself as a real competitor to the French trend forecasters, found it difficult to compete and so were wound up. The world economy conspired against them at the very moment when more fashion information was needed as the number of fashion 'seasons'

increased rapidly from the basic four seasons to six or more. The advent of fast fashion was a paradigm shift for fashion retailers allowing new trends to be rapidly translated in to products, and users of forecasting information had a wider range of formats than ever to choose from. Throughout the decades, improving communications infrastructures and societal change made consumers more fashion aware, demanding the latest catwalk looks at a fraction of the price as soon as possible. These factors combined still drive the fashion forecasting industry today, with greater speed and information demands on them than ever before and generated a host of new technologies to support forecasting. It is now easier than ever to obtain trend information around the world from the internet blog sites and online forecasters, to the mobile phone apps such as Trendtracker and Sartorialist. Some of these sites provide information for free at a time when those who used to fulfill such a role, the Trade Associations, are finding it increasingly difficult to support their free services. Perhaps this is the newest incarnation of democratic forecasting information, available free of charge for anyone who is interested? Other new technologies becoming available, such as X-Rite's Colour Munki, which can develop a colour palette from an image within seconds, might encourage those with little experience of developing colour palettes to do so. The implication from such a product is that anyone can develop colour palettes at any time, without the need for the considerable amounts of background research, creativity and decisions making process currently employed by colour forecasters in their developmental work. If colour cycles could also be used as a means to deliver more predictable, and accurate palettes as Rickman and Cosenza (2007) suggested, these elements combined may suggest a reduction in the need for commercially produced colour trend information.

5 The Forecasting Industry Today

'Fashion Forecasting is an art, not a science; it requires experience, intuition and the skilful collection of information on a continuing basis.'

(Wills & Midgley, 1973:481)

5.1 Introduction

The chapter will introduce some of the concepts related to the development of trend and fashion forecasting as used by the industry and discuss the validity of those methods. It will also examine a number of theories related to the development and diffusion of fashion trends, consider the role of colour forecasting within the industry, and its relationship with product. The chapter will aim to partially answer some of the research questions:

- What are the key information sources?
- Are information sources duplicated by forecasters, designers and colourists resulting in homogeneous trends?
- How are colour palettes developed?

However, these questions will be answered more fully using the primary research in Chapter 6, Investigating Trend Development Methods of Forecasters. The importance of establishing accuracy in colour selection will be covered, and finally emerging issues in trend development discussed.

5.2 Various Approaches to Trend Forecasting

Futurologists have been employed by numerous industries to predict changing consumer tastes for many years, and by applying some generic forecasting models that are not unique to Colour Trend Forecasting but used in many types of forecasting, provides a useful initial starting point for further analysis. Joyce & Woods (1997) proposed three key methods:

- Time series analysis – patterns in buying behaviour
- Econometric analysis – statistical techniques ascertaining why things occur
- Delphic polling – consulting expert opinions

Fashion and colour trend forecasting information draws on aspects of each prediction method, but includes a further factor, instinct, described by Polly Guerin, from FIT in New York, as "the eyes and ears of the industry ... a vital part of the auxiliary fashion business." Franck (2000). It is surprising that such a vital part of the industry has seen little substantive or systematic research into its methodology, accuracy or use. However, some evidence is available to contextualise forecasting methodology, allowing the three

methods to be evaluated in terms of their relevance and impact upon colour trend forecasters. It is also important to consider the timescales used in colour trend forecasting, which is also illustrated in Fig. 5.1.

- Collection and synthesis of information - minimum of 2 years in advance.
- Publication of the information - minimum of 18 months ahead of the season.
- Confirmation of colour directions from alternative sources (trade fairs, suppliers etc) - minimum 12 months ahead of season.

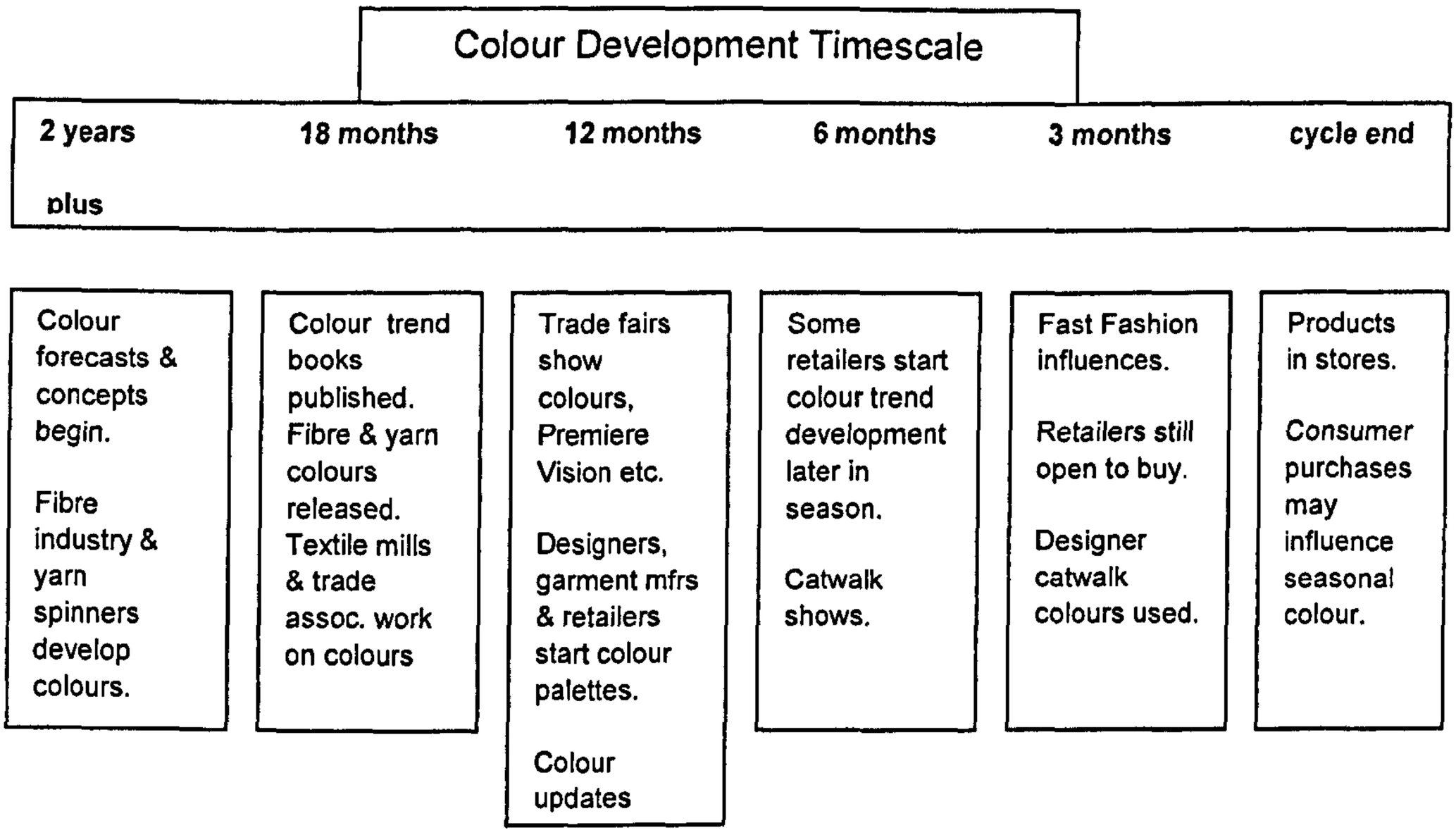


Figure 5-1: Colour Development Timescales and Influences (Source: the author)

Li Edelkoort, the highly influential trend forecaster and founder of forecasting agency Trend Union, has suggested that the forecasting process is one that is artistic, intuitive, and impossible to apply objective investigation to (Diane & Cassidy, 2005). This was supported by Sherrill and Karmel, (2002:16)

'Fashion is driven now much more by the way we want to live; it is much more related to other categories. People are better informed but don't necessarily know how to absorb the information. They will go for a detail or style but don't know why.'

The only certain aspect of trend forecasting is the place in product development's critical path. The critical path is the seasonal planning schedule used by designers, retailers and

manufacturers to plan their schedule of works in order to receive the goods into store on a specified date. Some believe the approach is flawed; Anne Lise Kjaer used to publish her fashion trend books, Kjaer Global, and is now a trend consultant for companies such as Camper, French Connection and Ikea working to a very different timescale. Kjaer is quoted in *Style in Progress,* an Austrian based magazine:

'Now the span between deliveries is so short that there is simply no time left to think. It's not better, just faster.....I produce only one trend book each year instead of eight. Why should I make trend books for such a fast paced industry? I can forget the fashion sector.'

(Schirrmacher: 2006:62)

Fast fashion has undoubtedly contributed to the increased pace of fashion, and the frustrations which Kjaer has experienced, resulting in her completely rethinking her business model and moving out of the fashion forecasting business completely. Nevertheless, the pace of fashion continues to race ahead, with constant demands on time and new trends to tempt the consumer into buying. Colour still has to be at the early stage of the development process, whatever the timescale involved.

Figure 5-2: Colour trend decision making at The Mix

The trend information gathering is the initial phase in the development process, so colours have to be ready at an early stage to facilitate the process. The timescales involved in colour forecasting, the influences and various players involved in the cycle were outlined in Fig. 5.1, Colour Development Timescales and Influences, which illustrates there are a number of iterations which will be made between the various organisations at different stages in the process. Some forecasters, who are developing their trends at the beginning of the cycle, two years ahead of the season, also work with textile mills early, then trade associations later in the process, helping to develop their product specific colours. Others contribute to the major industry trade fair colours, or work directly with retailers providing a more bespoke service. Colour update cards, usually published twelve months ahead of the season may change the original colour predictions substantially, or confirm colours seen in more recent catwalk shows. Areas such as fast fashion and new catwalk trends continue to influence the commercial forecasters, who, it must be borne in mind, are developing new colour palettes every six months. They may be influenced by colours seen at trade shows, as a response to a particular product's success or by an influential designer. In place of a linear diagram, a spiral could be developed from Figure 5.1, in which there would be a continuous spiral of colour influences working in parallel. These timescales and their position in the product critical path and supply chain will be explained further, in particular in relation to the retailer's case studies.

5.2.1 Time Series Analysis

Examining patterns in consumers buying behavior is commonplace for the larger retailers and leading brands. Electronic point of sale (EPOS) data has provided the basis for the detailed sales forecasts commonly used today, and continued consumer profiling assists in the explanation of why consumers purchase what they do and when they do. Time Series Analysis (TSA) analyses consumer behavior in detail, which can be defined as:

'The processes involved when individuals or groups select, purchase, use or dispose of products, services, ideas or experiences to satisfy needs and desires'.

(Solomon, 1994:7)

The information gained from such a variety of data can be translated in to future trends, specifically by analysing seasonal patterns, useful for determining seasonal colour ranges, or rising demand, used mainly for identifying key colours and being able to replenish stocks quickly and effectively. However, research in the US suggests that consumers are spending less time shopping for clothing nowadays (Chu & Lam, 2000), and purchasing patterns are changing, with the advent of internet shopping and the traditional direct mail, or telephone catalogue shopping becoming less popular, particularly with younger consumers. Whilst forecasters undoubtedly do use some information regarding purchasing behavior, it does not appear to be the primary source of information or

inspiration when developing colour trends. This will be covered in more depth in the longitudinal surveys with retailers in Chapter 7.

5.2.2 Econometric Analysis

Statisticians and designers have never been comfortable bedfellows; even the statistics based merchandising function is clearly delineated from the more creative, aesthetic role of the buyer in larger organisations. However, Econometrics is a part of economics that employs extremely sophisticated techniques, such as regression analysis, in order to model why things have happened. From this initial model, specific variables can be selected and changed in order to predict what impact there may be on the remainder of the variables (Joyce & Woods, 1996). Regression analysis is largely based on past data, and forecasting is always looking for either the current or the very new, so this would appear to be of limited value when developing a future colour or fashion trend. However, retailers do use sales data modeling to determine future demand (Sichel, 2008, Weber and Kantamneni, 2002), and in particular EPOS (Electronic Point of Sale) data to measure the success of specific product lines, and in some cases, colour too. This will be explored further in Chapter 7 as a part of the longitudinal surveys carried out for the thesis.

5.2.3 Delphic Polling

Consulting experts for their views on how they believe a particular product, event or lifestyle change may influence future trends is perhaps the method which sits most easily with trend forecasting today. Many forecast groups use hundreds of 'experts' from around the world to inform and explain why particular concepts appear, whether in clothing or computers, this is now an accepted method of establishing the latest trends. Examples of organisations which do this extremely well are WGSN, the online trend forecasting company, who has representatives around the world, photographing rock concerts, store windows, catwalk shows, bars, nightclubs and people watching. Vast quantities of information are quickly fed back to the web site for immediate dissemination to their subscribers, who can access it within hours. Raymond (2001) suggests that these organisations are really trend research agencies, picking up signals early before the influences have a chance to reach the high street.

In London, Global Colour Research, publishers of The Mix colour trend forecast books, gather a group of colour experts together from around the world in order to develop their colour trends, using the Delphic polling model quite literally as outlined in Chapter 6. The practice of using external experts within a business to develop colour predictions has further support from industry, as evidenced by Raymond's (2010) comment.

'Experts add colour, depth, resonance and new layers of understanding, insight and credibility to your forecasts.'

Raymond (2010:56)

The popularity and widespread use of delphic polling using expert practitioners is clear, and undoubtedly the committee approach will continue as it generates a wide range of views from experts in various markets around the world, which can subsequently be synthesized into a homogenous colour forecast. It also has a potentially higher rate of accuracy as a wide range of experts have contributed their ideas and endorse the final colour concepts.

5.2.4 Cool Hunters

There were numerous nomenclatures used by forecasters within the literature surveyed, with new descriptors emerging throughout the duration of the research aimed at conveying what the role of these individuals was: cool hunters, fashion watchers, trend researchers, scouts, a variety of names exists for essentially the same job; identifying the germ of an idea, being present at the very inception of a trend, being able to relate specific activities or products to new shifts in consumer lifestyle and behavior. Such specialists are not trend forecasters as such, and do not always see themselves competing with the forecasters either, although they may form part of the forecasting organisations team. DeeDee Gordon, director of market research and product development at the US advertising agency Lambesis Inc, compiles the agency's L Report, a quarterly digest of international youth trends, started in 1994. Gordon is recognised as a key player in the world of cool hunting, buying 10-20 CDs a week, reads dozens of magazines a month, goes out every night regardless of which city she is in and is a 'complete fashion whore' (Rasmusson, 1998). She personally distils the information she gathers and is apparently not often wrong. A cool hunter could contribute to the forecasters publications, although may input concepts rather than specific colour trends, and may also contribute to the copy explaining the rationale behind the selection of themes, or defining the themes themselves. After interviewing several cool hunters, Piccaloni (2005) summarised the role thus: 'All agree that their specialty lies in interpreting the broad societal movements that transcend our flash fancies and reveal new marketing opportunities'.

5.3 Fashion Trend Development Theories

Ironically, in contemporary fashion markets change and innovation has frequently been driven by consumers as well as designers. The role of the fashion innovator has long been acknowledged (Meyersohn & Katz, 1957, King, 1963, Sproles, 1979,Goldsmith et al, 1999, Raymond,2010). Most existing literature acknowledges that women tend to be the key innovators within fashion. Beaudoin et al (2003:23)

'Past research has consistently found that there were more female fashion innovators than males... it is also well established that it is among young fashion consumers that we usually find the majority of fashion innovators.'

The role of the fashion innovator is linked to the forecaster as new trends are developed by the innovators at street level, sometimes in small sub-cultural groups, identified by the cool-hunters, trend analysts, designers or forecasters at an early stage, translated into more accessible or wearable trends, and promoted to clients as the next major trend (Goldsmith et al). Several trends may coexist at any given time (Cho & Lee, 2005). In 1983 Rogers categorised consumer adopters into five groups in an s-shaped 'diffusion of innovation curve' as seen in Fig 6.3:

- innovators
- early adopters
- early majority
- late majority
- laggards

These groups are supported by Raymond (2010), who believes these five groups are still essential for forecasters of all product categories today; the most important groups being the Innovators and Early Adopters, representing 2.5% and 13.5% of the population respectively. That the categories are still relevant today when examining fashion innovation and trend development is of significance even in the digital age, where Raymond (2010) indicates that how a trend is communicated 'ideas are disseminated more swiftly online than they are in books or on television', influences the intensity or speed at which a trend is adopted nowadays. This supports earlier evidence that trends are moving faster than before, in fashion as in other product areas, due to new communication technologies. Upon the introduction of a new style or silhouette, the retailers usually rely on the innovators or early adopters to purchase the garments as Goldsmith et al acknowledge (1999:8):

'They also spread word of mouth information about new styles and legitimize them when they adopt, thereby influencing the larger numbers of later adopters who look to them for information and influence.'

In terms of the percentage of the population, the Innovators and Early Adopters represent just 16% of the population between them, but the Early and Late majority each represent 34% of the total population (Lynch, 2007). Consequently, although the percentage of innovators and early adopters are not in the majority, their influence is of enormous importance in both fashion trend adoption and retailing terms.

5.3.1 Trickle Down Theory – Simmel and Veblen

Theorists have contemplated fashion since at least 1575 according to Welters & Lillethun (2007) and have identified many models of both cyclical and directional change and fashion influence. One of the key theories developed in 1899 by Thorstein Veblen, an economist and sociologist, was that industrial expansion produced a wealthy, leisure class who invented 'conspicuous consumption'. Georg Simmel also a sociologist, reached similar conclusions five years later and suggested that fashion occurs in hierarchical groups of society where people may move between the classes according to their wealth. Lower class groups would try to emulate the higher classes by copying their dress, but as they did so the higher classes moved on to the next fashion. This was presented as the 'trickle down' theory. Some aspects of this can still be seen today where wealthy celebrities' outfits are copied by low cost retailers and quickly adopted by the less wealthy classes. However, this does have a slightly different significant today with the advent of mass produced garments, as in Veblen and Simmels era all garments were made by hand, and experienced a far longer lifecycle than contemporary apparel.

5.3.2 Trickle Across Theory - King

With the obsession surrounding celebrities in contemporary society, and new communication technologies, it is far easier to disseminate a new trend than ever, promoting the image of status, celebrity awareness and wealth, usually gained through the media or the internet (Lynch, 2007). Ironically this was essentially the finding of King (1963:111).

'Mass communication media rapidly accelerate the spread of fashion awareness and influence mass market endorsement.'

In 1963 King challenged the traditional trickle down theory, asking if it 'accurately reflected contemporary fashion behavior?' King also discussed the role of the innovator and the fact the 'fashion influentials' tended to be in the late buyer groups, 'defining and endorsing appropriate standards' across all social strata. He saw this as being mobility for fashion trends to trickle across rather than the traditional trickle down through society proposed 60 years earlier by Simmel.

The acceleration of the fashion industry, and the advent of fast fashion, can be clearly linked to the advent of the Internet, and the rapid communication network it provided. Suddenly designer catwalk collections could be viewed online within hours of the show itself, and sent around the world with the same degree of immediacy. Online forecasters such as WGSN and Stylesight emerged, again using web technology to provide instant fashion updates, reports from not only the catwalk shows, but also from trade fairs and the street, where many styles begin with the Fashion Innovators. Of course, King was not referring to the internet in 1963 when he first compiled his theory, but instead to

television, radio and magazine formats which were featuring reports from the catwalks and bringing fashion to a far wider group of consumers than ever before. What he would think of today's internet systems and the speed at which they operate is open to speculation.

However, as argued by Cho & Lee (2005), several trends can run concurrently, and many styles, shapes and colours can be identified as classics, or core, not subject to the vagaries of trends.

'Some fashion always exists and fashion per se is indeed, immortal, which fact seems to affect in some manner or other each of its manifestations, although the very nature of each individual fashion stamps it as being transitory.'

Meyersohn & Katz, (1957:596)

5.3.3 Trickle Up Theory - Field

By 1970 a further fashion theory had been developed regarding directional flow of fashion influences. The notion that trends can trickle up through society was introduced by Field in 1970, and referenced the influence of the civil rights and black power movements, the sexual revolution and the domination of youth in society as cultural attitudes shifted from those held previously. It was also referred to as the 'status float phenomenon' (Welters and Lillethun, 2007:78). Sub groups in society originated their own fashion styles, dress codes and markers to identify themselves a group. These were later developed into the more identifiable groups of Punks, Mods and Goths in the mid to late 1970s. The higher end of society was influenced by their look, which was essentially a rebellion against the establishment and the typical social hierarchies which had existed for decades.

A phase of considerable progression emerges from the research, spanning a twenty five year period between the 1980's and early 2010, which is of fundamental relevance to the study. By establishing the conceptual framework, based around the traditional theoretical notions of fashion progression through either the trickle up through society (Field 1970), trickle down from the higher classes to lower classes (Simmel, 1904), or trickle across social groupings (King, 1963) theories, the relevancy to the established patterns of fashion and colour trend cycles (Kroeber, 1919, Robinson, 1975, Lowe, 1984), were examined. The early beginnings and subsequent refinements to the presentation methods and content of the genre will be analysed in order to establish the context for the contemporary business.

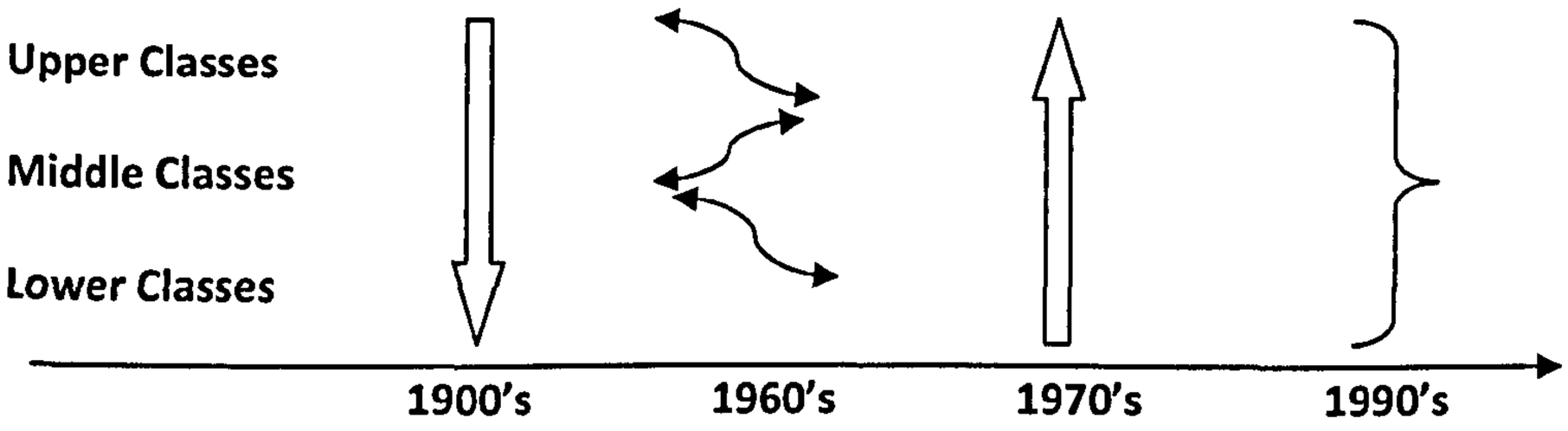


Figure 5-3: Fashion influence through the 1900's (developed by the author)

The role of fashion innovators identified by the work of Goldsmith et al (1999), and Meyersohn & Katz (1957), in the progression of fashion trends provided an invaluable insight into the relevancy of the three "trickle" directional theories in contemporary fashion, as illustrated in Fig 5.3. A further addition to the directional theories is that which encompasses all areas of society, who are influenced by and able to copy one another's style far more easily than ever before with the rise of the weekly fashion consumer magazine, online communications, and the cheaper price of clothing. By the end of the twentieth century it was apparent that fashion innovators and early adopters could be drawn from any of the previously identified social strata and that fashion had become far more democratic, available to all groups of society, whatever their budget. In particular, the development of the fashion innovators' role over the past 20 years has been of interest to trend forecasters. This is indicative of McKelvey and Munslow's (2008) pluralisation of trends, where there are numerous trends available to the consumer through the high street or at designer level, than ever before.

Throughout, the innovators, or antennae groups, were viewed by some as being responsible for identifying and developing trends, not the forecasters pushing a particular concept (Raymond, 2001). Similar inceptors are found in colour trend development, where the colour forwards are followed by colour prudents, and finally the later adopters of new colours, the laggards echoing Robert's 1983 curve. This segmentation was developed by The Cooper Marketing Group and contains consumers who are by no means fashion innovators, but shop at both discounters and upscale department stores (Brannon, 2000).

5.4 An Evaluation of the Role of Colour Forecasting

5.4.1 Position in the Fashion Cycle

Colour forecasting, as discussed previously, is a fundamental element of the creation of textile and garment collections, and a means employed by manufacturers, designers and retailers in the development of their apparel collections. It has traditionally been required as the first stage of the design process, typically two years ahead of the season (Brannon, 2000, Diane & Cassidy, 2005), and involves the systematic evaluation and synchronisation of past seasonal colour influences, socio-cultural and economic factors, fashion trends and

even the forecasters' intuition to create several colour palettes applicable to a variety of market sectors. Similarly, the product development process requires colour information at a very early stage in the cycle as it is essential to ensure all products in store which are to be merchandised together, match in colour or similar hues. The potential number of products within the range can be considerable.

'The colour story will be combined into prints, yarn-dyed fabrics, and solids and coordinated across jackets, tops, skirts, pants and dresses into a collection with perhaps 200 separate pieces.'

(Brannon, 2000:116)

Additional products not mentioned by Brannon include footwear, leather goods and accessories, further expanding the overall number of separate pieces possibly influenced by early colour development decisions. Further items would also be required in the correct and accurate colours for garment components, such as zips, thread, buttons and other fastenings and closures, all of which would require dyeing to match the entire product range. Consequently, ensuring colour is ratified at the earliest possible opportunity in the product development cycle significantly reduces the risks associated with poor colour matched trims, accessories and related products. Dutch forecaster Li Edelkoort, who is perhaps the best known of all colour trend specialists, having been involved in colour forecasting for over 30 years, noted in July 2002 the strong relationship between fashion and interior colours.

'In many cases, all the colours in interiors and fashion go hand in hand. Today we see that colour-stories often take flight within the world of design and home textiles.'

(Edelkoort, 2002:1)

Brands which also offer lifestyle and interior products alongside their fashion collections may, as Edelkoort suggests, use fashion colour information to develop their interior product ranges, hence requiring further colour synergy between extended product ranges.

It is not an exact science; indeed, many organisations within the fashion and textiles industry do not always use commercially produced trend information, preferring instead to gather their own material and interpret it according to their own customer demographics, colour 'signature' or market sector. Most tend together data from a wide range of similar sources, as cited by Jackson (2002:131).

'Buyers and fashion designers are able to predict what is likely to be 'in fashion' through a combination of influences, including reviewing important textile and style magazines, the specialist services of trend forecasting agencies, and visits to textile and garment fashion shows.'

Colour forecasting developed into a very individual service area, acknowledged by Brannon (2000), Diane & Cassidy (2005) and Perna (1987) as being one of the vital, early elements required within the fashion development process. The increasing sophistication of the consumer and the development of a global high speed communications infrastructure, in the form of the internet, have realigned the original structure of the trend forecasting industry, which first began in the 1930s.

Originally the industry followed the traditional designer trends of the renowned international couture houses, Dior, Chanel and Givenchy, only available to the very rich at the upper end of society, as proposed by Simmel and Veblen. Brannon (2000) suggests that the early 1990's saw a paradigm shift in the number of seasons used by the retailers to segment their fashion year, increasing from four to six seasons, something which had begun in the late 1980's. Some believe the change in forecasting came even earlier, as discussed McKelvey & Munslow (2008), indicated a major shift from the 1960's onwards in the dominance of the single fashion trend, to today's mass market fashion industry which adopts designer catwalk trends faster than ever before. This could be linked to King's Trickle Across theory (1963). The view is supported by Jane Kellock of WGSN, interviewed for the research in 2008.

'In general trend development took much longer in the early 1990's than today, although we still gained influences from similar sources, travelling, music, clubs, exhibitions.'

(Kellock, 2007)

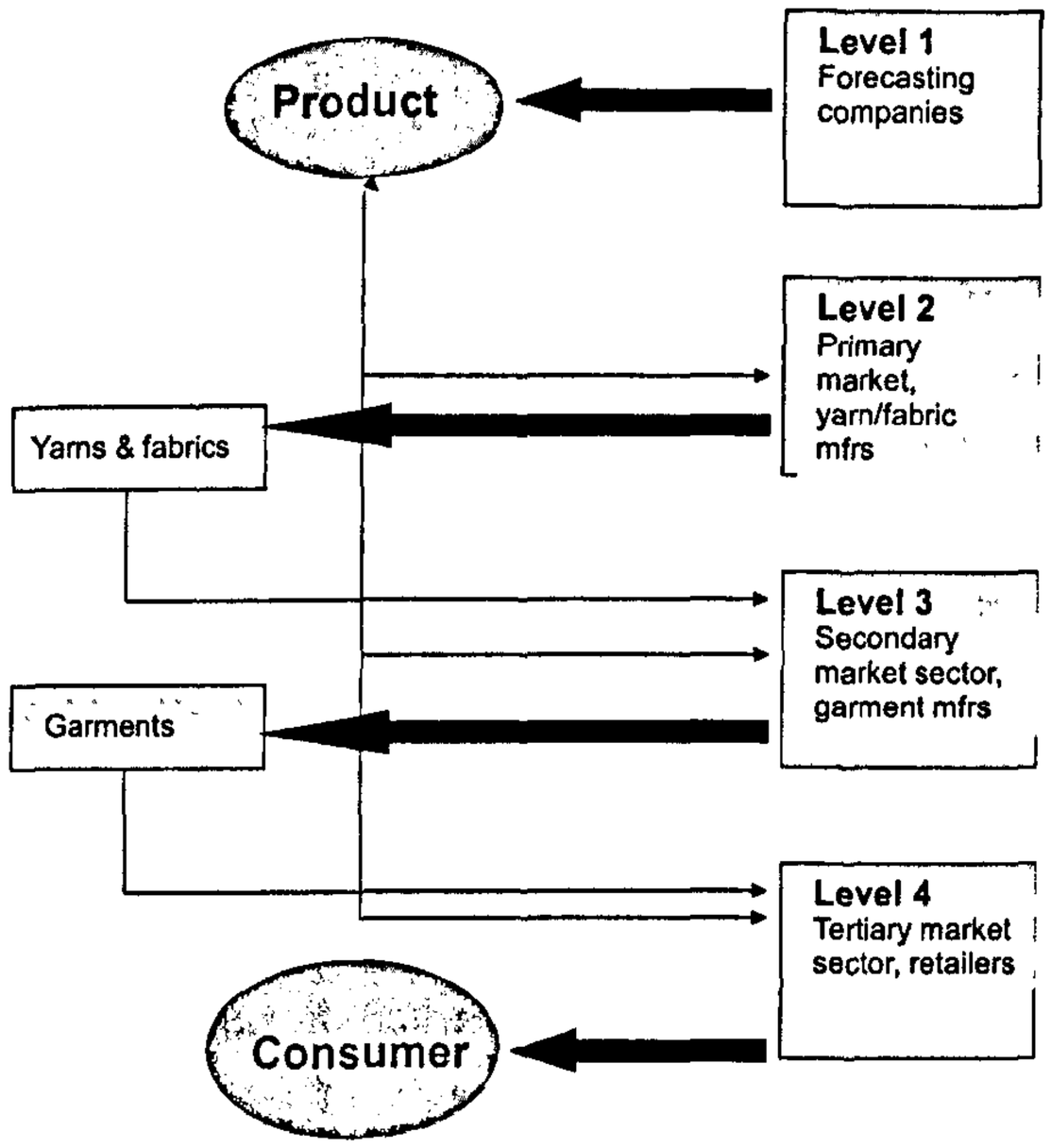


Figure 5-4: Use of colour forecasting information within the fashion & textile industry (Diane & Cassidy, 2005)

Diane & Cassidy's model in Figure 5.4 illustrates how the commercial forecasting companies and the advanced information they provide influence the product itself, the product development and the manufacturing processes prior to reaching the consumer. It clearly indicates the necessity of colour early in the product development and range planning cycle, as it has a direct relationship to the manufacture and dyeing of yarns and fabrics at Level 2, which are essential to progress to Level 3, garment manufacture.

The only aspect which Diane & Cassidy's model omits is the timescale of such product development, which would normally start over two years ahead of the season with the forecasting companies at Level 1, or to be more precise, two years ahead of level 4, and the end consumer. The timescale and those involved directly at various points in the timescale can be seen in Fig.5.1. Colour Development Timescales and Influences, which reinterprets Diane & Cassidy's model into a clearer timeline driven series of milestones within the development of colour trends, and will be referred to throughout the thesis.

5.4.2 Colour Trend Communication

Many contemporary forecasting companies publish large trend books, or present their ideas on line (Brannon, 2000, Diane & Cassidy, 2005, Raymond 2010); seasonal concepts are usually presented in several themes or stories, perhaps four or five each season, which each have a different topic, look and feel, and in the case of colour forecasters, each have a different range of colours presented. This diversity allows customers to develop a range of products, either by using all the different stories

presented, or by selecting one theme, or group of colours relevant to the clients' market sector and consumer profile.

The oldest of these, Carlin, was established in 1947, just after the end of the Second World War, and in response the rejuvenated fashion industry in the country following its liberation. Indeed, it is interesting to note of those forecasters who cited their date of inception, many of the larger, more established companies were founded in the 1970's and 80's as discussed previously. Early publications were simplistic and unrefined in comparison with today's lavish publications; graphics were simpler before the advent of desk top publishing software, and it was accepted as the norm for the time. One example of an early 1980's publication is illustrated in Fig. 5.5, The IM Report from Winter 1980/81. Although when contrasted with today's publications, it appears simplistic, at the time The IM Report set the benchmark in trend books and was highly regarded and respected. In order to communicate colour, fabric swatches were dyed and pasted in the book itself, rather than relying on a printed version of a colour which might not have been as accurate.

Figure 5-5: The IM Report Colours Autumn/Winter 1980/81

By today's standards, the early ring bound trend forecasting publications look naïve and basic, with dated colour names such as Powder Blue and Lavender Water. In the 1980s Perna reiterated the importance of naming colour precisely:

'When reporting or discussing colour it is absolutely mandatory to be accurate about its value and intensity. It is not just Blue – is it Bristol Blue, Cornflower, French, Royal, Azure, Blueberry or Ink?'

(Perna, 1987:155)

Brannon (2000:121) has a slightly different view on why colour should be described in detail which would impact on the value, or perceived value, of the products on sale.

'Lower socio-economic consumers tend to prefer simple colours that can be described in two words: higher income people prefer more complex colours.'

It has been noted during the research that colour names have become more detailed as the years progressed, perhaps in response to changing consumer preferences and market drivers, but overall the trend prediction publications have become more detailed in recent years incorporating more fabric, yarn and materials swatches. The early publications simply named colours; such an imprecise approach could not be used in today's globalised fashion market, which required completely accurate colour communication. Thousands of potential colours required a unified language of colour communication, so colour standards such as Pantone, Munsell, NCS (National Colour System) and Scotdic were developed. In these systems, each colour is identified by a series of numbers and letters and can be referenced globally and accurately as a result (Guerin, 2005). The Pantone system alone is able to reference almost two thousand colours in cotton or paper, in a book or a 'fan' booklet format, where each colour has a unique identification number (McKelvey & Munslow, 2008). Using just the unique colour reference number, for example Pantone 226U represents a vibrant fuschia pink, whilst 464U is a deep chocolate brown, designers and manufacturers communicate colour alpha numerically without ever needing to see the actual colour itself. Consequently, many forecasters began incorporating colour referencing systems in the early 1990s as garment production moved further offshore and colour needed to be communicated across the globe more accurately. As described earlier, Pantone now has an app for the iPhone which allows users to determine the Pantone reference of any colour the user may wish to photograph instantly. Such colour reference systems have been invaluable

5.4.3 The Decline in UK Garment Manufacturing

There have been relatively few players entering into the forecasting business since the 1980s, with the notable exceptions of the exclusively online trend providers such as WGSN, Stylesight and Trendstop, and colour specialists The Mix. Why might this be so? The decline in phases of the UK clothing manufacturing industry has been well documented, with Jones & Hayes (2004) noting two significant periods of decline; first between 1978 and 1983, and later in the mid 1990's has had an impact on the way in which retailers, designers and manufacturers have responded.

'The decline is both dramatic and confirmed by many data series, e.g. between 1993 and 2002, employment fell by 48 per cent; in the period of 1995 to 2002 output (physically

made in the UK) fell by 44 per cent; between 1995 and 2001 the number of companies in the sector fell by 35 per cent.'

Jones & Hayes (2004:262)

The considerable rationalisation within the industry no doubt led to companies focusing even more on their product, looking to ensure their design was appropriate for the market and for their customers; forecasting could help to provide one of the support systems in order to achieve such goals. By understanding the market, well in advance of the season, companies could help to prepare themselves for the coming seasons and potentially even economise on travelling costs, sending fewer staff to international trade fairs, or on overseas inspirational shopping trips. Consequently, by investing in the commercially produced trend books, and using the content appropriate to a specific market sector or demographic, the organisation is also buying in to the global research conducted by the forecasters and their network of staff worldwide.

Perhaps this explains why there was such a profusion of forecasting companies founded in the 1970's and 1980's; they were providing a value added service to support a struggling fashion and textile sector. Whatever the true reason for the growth during the period, many of those companies grew to become the large multi-nationals they are today. Some however, did not survive. Notably in the UK forecasters Deryck Healy, Design Intelligence, Nigel French, and Index, all strong agencies and well regarded in their time, did not survive the market conditions during such times of decline.

5.5 Establishing the Importance of Accuracy

What is clear is that in today's rapidly changing fashion industry, whilst developing new lines each season is essential for both the design process and the retail outlet in order to satisfy consumer demand (Crane, 2000, Cresswell, 2001), accuracy in predicting future trends, including new colour palettes, is vitally important. If the trend is not right, the products will not sell. The core business of devising and promoting colour trends is one that many believe is essential to survival in the increasingly competitive marketplace (Brannon, 2000, Porter, 1994, Linton, 1994). Indeed, Jackson (2001) goes as far as to suggest that in the recent past (perhaps the 1980's?) a garment would always sell if it were the 'right' colour, colour was rigidly dictated; today the increasingly competitive market place and sophisticated consumer allows a wider range of colours to be presented, stimulating greater consumer choice, and allowing manufacturers and retailers to develop their own colour palettes in reaction to the major seasonal 'fashion' colours predicted.

A generic global colour prediction would not be applicable for the wide variety of modern apparel industry sectors; for example seasonal colours devised for girlswear may be

different between pre and post-teenage collections. Countries around the globe experience summer and winter at different times of the year, so whilst Europe has its winter colours for a season spanning November to February, Australia is experiencing its summer. Forecasters often either produce specific publications to cover the markets, or work with individual clients to develop exclusive colour palettes tailored to a specific market segment, be it apparel or automotive. Most forecasters build their reputation for accuracy through the publication of glossy trend books, illustrating usually four to six major colour themes for the coming season, either spring/Summer or Autumn/Winter, offering a one-on-one prediction service in tandem with their universal seasonal palettes (see Figure 4.5: Forecasters Mapping). The more generic published colour trends have been suggested previously as being 80% accurate overall (Perna 1987, Hipsey, 1995), however when catering for such a broad market with a selection of diverse colour stories or trends, it would be reasonable to assume that some colours would be appropriate for a variety of design decision makers in varied markets. Piccalo (2005) questions what parameters could be used to measure accuracy in trend forecasting 'when the line between a genuine societal trend and one manufactured by media and advertising is now so blurred.'

An interview by the author with Kate Bostock, Director of Marks & Spencers, in 2008 revealed her approach to colour and trend development, one which she had brought to bear within the company.

'We use a lot of colour information for developing the colours in the design teams, plus we travel to shows, attend colour seminars, visit fabric mills and use their information, as well as buying some of the trend books. Developing colours and trends is very much instinctive. We change our information regularly and don't stick to one constant formula. Fabric and colour are certainly put first on the design agenda.'

(Bostock, 2008)

Such comparative analysis of a range of forecasting information clearly allows users to distil a multifarious range of information in order to develop selective trends which are suitable for specific consumer profiles or markets, thus ensuring the resultant information is as accurate as possible within the retail groups. The evidence to date suggests that the colour forecasters offer the client the ability to cut out the processing of analyzing trends and translating them initially into colour use (Lambert, 2004), saving time and being able to react to change more rapidly. Bruce & Daly (2006) found organisations allowed a degree of flexibility to change some colours much closer to the actual season, adding or removing, or simply altering their existing colour palettes. As Guerin (2005) indicated, it tends to be a matter of personal preferences, led by the design director, buying teams and other senior staff within the organisation who are actively making seasonal colour decisions. It is common to find that certain forecasters work with particular clients year

after year; they usually find their 'signature' and trend design approach complement one another well, and so continue the association as long as it is commercially successful.

'Subscribers may purchase more than one service to cross reference and confirm commonalities in colour, fabric and trend information. It depends on budget limitations only.'

(Guerin, 2005:19)

This is a view supported by Amy Aspland of Huepoint inc., an American colour forecasting specialist, who believes 'no one system can fill all your needs.' (Guerin, 2005:51), thus the trend for purchasing from a variety of trend forecasters continues to develop, with a constant eye on the commercial bottom line – profit.

However, if many do distil their own trends from a variety of publications, there is some implication that the forecaster's clients do not believe any one firm is 100% accurate in its predictions and are prepared to compare various sources prior to selecting the colours they will use. This will be examined further in Chapter 7. Unfortunately, there are limited publications in this field to examine, resulting in much of the evidence being anecdotal. There is also little substantive evidence to support or question Perna's or Hipsey's statements regarding accuracy. Cassidy's estimation of 50% accuracy is also broadly unsupported by factual analysis. Brannon (2000) also argues that no single forecasting discipline is accurate, but each serves a complementary function, and that the only method to assess the accuracy of forecasting is to include milestones, 'points where the forecast can be evaluated and adjustments made' (Brannon, 2000). Many of the larger forecasters themselves do indeed employ this method; Peclers Paris, one of the largest and best known fashion forecasting companies, send out updates on their main colour book closer to the season and have a publication entitled 'Trend Update', described in their 12th edition of 'Who is Peclers Paris?' (2001) as 'the signs of the times illustrated by mini-stories for the upcoming season or for last-minute deliveries'. This allows them to change their original predictions if necessary, even adding new themes, modifying colour palettes and removing some trends completely. Whether this is beneficial to their clients is not clear; based on primary research with major UK retailers, colours have usually been finalised and 'signed off' long before the new updates are released in order to allow time for lab dips and information to be passed onto their suppliers worldwide. There is also research in progress by Chitre Buckley, a fellow PhD student at London College of Fashion, investigating the range and implications of in-season fashion trend information on decision making for own-brand retailers operating in the UK. However, results from this have yet to be published.

Global Colour Research, publishers of The Mix colour forecasts, often refer back to earlier seasonal predictions when delivering presentations to industry.

At a presentation in October 2002 at Interstoff Asia, Hong Kong, made by the author on behalf of the company, the comparison was made in the script between The Mix colours for Autumn/Winter 2003/04 and the colours presented at the Italian Moda In trade fair. The three colour stories presented at the Italian fair were almost identical to The Mix colours, but as the presenter noted 'there is only one major difference between our colour proposals and those presented at Moda In, and that is, our colours were available to you 9 months ahead of theirs.' (GCR, 2002).

Figure 5-6: Comparison between The Mix and Moda In forecasted colours

It is unclear as to whether or not the Moda In forecasting team were influenced by other forecasters, or developed their colour trends in isolation, identifying the same themes and directions as The Mix. Once again, there is no additional information regarding the accuracy and adoption of the colours by the industry, translating into high volume consumer sales. Whether or not the retailers closely adhere to the forecasted colours, or use them to supplement their own colour directions based in customer profiles, market sector or in house style will be explored further in Chapter 6, section 6.6.

5.5.1 Emerging Issues in Colour Trend Development

There are alternative sources of colour trend information such as that provided by membership or trade bodies, including the Colour Association of the United States (CAUS). Additionally, influential fabric and yarn trade fairs have developed their own colour committees (often comprising representatives from the major forecasters) to predict advance colour trends unveiled at the trade shows, somewhat duplicating the forecasters information, but designed for specific market sectors such as yarn or fabric. Perhaps the most influential of these shows, acknowledged by Brannon (2000) and

Jackson (2001) is the Paris based bi-annual fabric show, Premiere Vision. However other analysts (Raymond 2001) are less convinced of the validity of taking colour verbatim from such sources, preferring instead to develop more ethno-graphic and socio-graphic versions of trend information, determined through statistically based marketing tools, or observational techniques. Diane & Cassidy (2005) determined that intuition was one of the most important tools available to the forecaster, and this is explored further in Chapter 6. Not all academics view this as being a positive development in the marketing field, especially for the fashion sector. Brannon (2000) cites the 'mechanism of boredom' from the consumer as being behind the constantly changing colours in the fashion and fashion marketing industry. If garment colours do not broadly adhere to those predicted and widely promoted within the seasonal marketplace, retailers may be left with stock on the shelves. This may be likened to Bylthman's (2004) findings regarding supermarket ready meals 'why it all tastes the same', most convenience meals in UK supermarkets are manufactured by the same small group of companies, using the same mass-produced ingredients. Although consumers are driving and demanding change, the fashion colour changes they receive are increasingly homogenised across the UK high street.

It has long been recognised that colour does indeed influence the consumers purchasing behavior, many items of clothing are purchased in accordance to a particular 'colour-code', conservative, dark tones in men's suiting has been matched by women adopting similar neutral colours (Fehrman & Fehrman, 2000). However, even in such a conservative atmosphere as the office, colours do subtly change, with new colour introduced through subtle variations on existing sober suiting, such as a turquoise or fuchsia pinstripe instead of the usual white stripe in a navy suit, or through colours in ties, shirts and blouses. The lifespan of a classic suit in black or navy will normally be longer than a high fashion blouse or shirt, as such classic garments last far longer than very short-lived fads, or fashion items (Solomon, 1994, Brannon 2000), and have peak selling periods (Hipsey,1995). Fashion colours show a marked change every two years according to Linton (1994), supported by McIlvenna's MA research (1991), reflecting social and economic change (Brannon, 2000, Porter, 1994). It appears that brighter colours become popular during periods of economic expansion or stability, whilst more sombre shades are to be found during times of recession (Brannon, 2000). Cycles of colour influence will be discussed further in Chapter 7.

How do the forecasters manage such diverse information? When predictions are compiled over two years in advance, how can they account for sudden changes in society or economics, such as war or terrorist attacks which may affect world markets and cause a sudden global economic downturn? Can they possibly consider consumer colour preferences in specific market segments? There is evidence to suggest that this may be possible, accounting for the cultural context in which consumers develop, their gender, age and ethnic background (Paul, 2002), explaining the myriad influences of a

demanding global consumer, providing accurate, largely homogenised colour forecasts two years in advance would seemingly be impossible. Consequently, forecasters can only respond to key sociological, cultural, technological or socio-economic events retrospectively, perhaps modifying their colour predictions when producing updates much closer to the season, as many do. This practice helps to add to the semblance of accuracy in colour trend predictions. When examined, the Peclers later Colour Confirmation Card is significantly different to the original colour book, published one year earlier. How their clients respond to such major changes remains unclear at present. If one were to adopt Rickman and Cosenza's (2007) suggestion of using predictable colour cycles to drive change and ensure accuracy this may negate the need for a colour update card, but may also miss the subtle nuances of socio-economic or cultural changes which necessitated the updates originally.

The notion of colour forecasters influencing and directing colour change can be challenged if indeed they are simply responding to social and cultural changes. Earlier, comparisons were made between Brannon and Sproles' proposed methodology for the development of colour predictions. Sproles advocated focusing on the changing environment and future acceptance of proposed fashion styles, whilst Brannon suggested revisiting past forecasts and analysing the information related to them, such as sales data. Hipsey (1995) found that 67% of retailers used historical trading results to determine future design strategies, although this was a BSc research study, there is no further evidence on the subject matter available. German womenswear brand Betty Barclay uses trend coverage of the new season's collections to identify new key trends with mood boards.

'To visually evoke the feeling of the key trends. The images on the board can be travel picture, lifestyle images, and blocks of colour – anything so long as it conveys the message of the trend.'

(Marrion, 2005:37)

It is interesting to note that like Popcorn and Gordon, the design team researches all areas of modern life, but that a block of colour can still play such a major role in the identification of new directions at a very early stage, thus illustrating the importance of colour in the apparel industry. Betty Barclay's in-house designers then create the seasonal colour palettes which are relevant and not too avant garde as to alienate their core customers, providing stability, continuity and a strong brand identity. There are those who believe that specific methods of determining future trend forecasts are available and used by the commercial companies.

'The process of fashion forecasting is... based on consummate research and exposure to cultural and global activities. Therefore the creative fashion presentation professional is a

consummate researcher in a wide scope of fashion centres, including European runway and textile trade shows.'

(Guerin, 2005: 6)

French trend forecaster Nelly Rodi suggested there may be in excess of 1,000 consumer profiles nowadays, a marked contrast to the early 1980's when there were just twelve (Merrett, 1999). Many others brands and retailers have adopted such customer profiling, working to their strengths and key signatures. Many designer brands are acknowledged for showing a specific design ethos which often is interpreted by colour: Armani favours neutrals and muted colours: Prada pushes the boundaries with clashing or challenging unusual colours; Jonathon Saunders uses his signature bold black and white in many of his pieces, and Matthew Williamson is revered for his brightly coloured prints and decoration. However, each of these brands ensures they utilise the iconic key seasonal colours thus maintaining colour currency within their collections.

What emerges is a general consensus that no underlying theory of colour in marketing has been comprehensively tested either (Grossman & Wisenblit, 1999), which may help to substantiate the claims of accuracy from the colour forecasting industry. There are a variety of texts indicating the importance of colour in the marketing of new products , Crozier (1999), Eskilson (2002), with Paul (2002), suggesting that colours create brand imagery and convey moods. As previously indicated, research has shown that colours can change according to the economic status of a nation or the world at large. However, colour marketing techniques were used as early as the 1928, around the same time that the early colour predictions were being developed, when The Saturday Evening Post informed their readers 'Motor cars are borrowing their hues from the waters of the Nile, from the sands of Arabia, the plumage of birds and the fire of gems.' (Eskilson, 2002). Colour marketing and colour forecasting clearly have synergies beyond the simplistic development of the right shade of blue for a car. It is no coincidence that the forecasters are now often seen as being a key part of the marketing team, where 'marketing and advertising create trends or steer us' (Piccalo, 2005), and the role of the forecaster has become blurred. Even the major industry players, such as the Carlin Group discuss 'precise marketing diagnoses in their 2001 promotional leaflet, interestingly titled *'Style and Communication'*.

It is apparent from the limited literature available that the fashion industry does indeed appear to widely use colour trend forecasting information, from the initial input at the yarn and fabric development stage as illustrated by Diane & Cassidy's 2005 model (Fig 5.4) but exactly how is such information developed, and how may it be contextualised within the industry? In the next section the role of the forecaster will be examined in relation to the fashion development cycle in contemporary fashion manufacturing and retailing,

together with the various methods employed by forecasters to develop their prediction for the future seasons.

5.6 *Fast Fashion's Impact on Forecasting*

The rapid turnover and generation of new concepts and trends has been apparently driven by several factors; the rise of more immediate communication networks such as the internet; the increasing demands driven by celebrity culture, and consumers who want to dress like their favourite celebrity; finally the emergence of fast fashion, which responded in part to the consumer cult of dressing like a celebrity, demanding high fashion, straight off the catwalk looks as quickly as possible. For the suppliers, manufacturers and retailers involved in the fashion industry supply chain, trend analysis and subsequent rapid development of commercially successful trends is a strategic part of their seasonal planning process, and one which is increasing steadily in pace.

'In the early twenty-first century, as fast fashion has become a commonplace on the high street, global brands such as Zara and H&M clamour for greater shares of the market. Technology has facilitated "just in time" manufacturing and has enabled faster retail turnover. Styles, and moreover clothes themselves are being produced with shorter lifespans than ever before.'

(Clark, 2008:427)

Rapidly moving trends and the philosophy of fast fashion, to essentially produce a facsimile of designer catwalk trends and launch them in store as quickly as possible (Tokatli, 2008, Bruce & Daly, 2006), has changed the nature of some aspects of colour trend development. Traditionally, colour trends were researched over two years ahead of the season, and developed by the forecasters, ready for publication eighteen months to two years ahead of the season. Clearly, with fast fashion timescales, such relatively relaxed and lengthy critical paths are not now possible for those retailers engaged in fast fashion.

Conversely, fast fashion is very much trend driven, and has successfully developed to respond to fashion trends, as its name implies, quickly. Colour forecasters may see a trend developing on the streets, or on the catwalk, and integrate it into their initial concepts, but if they publish colour information in hard copy, they are unable to release the relevant information quickly. Indeed, if they simply edited what was seen on the catwalk in isolation, they would soon be out of a job; copying design is not the same as predicting the coming trends. As Tokatli (2008: 23) explains, the purveyors of fast fashion do not invest longer term as the traditional retailers and manufacturers do.

'Fast fashion retailers do not directly invest in design but instead are inspired by the most attractive and promising trends spotted at fashion shows and by cues taken from

mainstream consumers They then transform these trends into products that can be put on the market almost immediately, freeing themselves and the consumers from the 'seasonal collection trap,'

Fast fashion and its influence on the development of colour palettes will be examined in further detail in Chapter 7. By expanding Gaskill's model introduced in Chapter 3, a clearer picture emerges of the extent of influences and key stages in the fashion development cycle (Fig 5.7), developed from Gaskill's by the author.

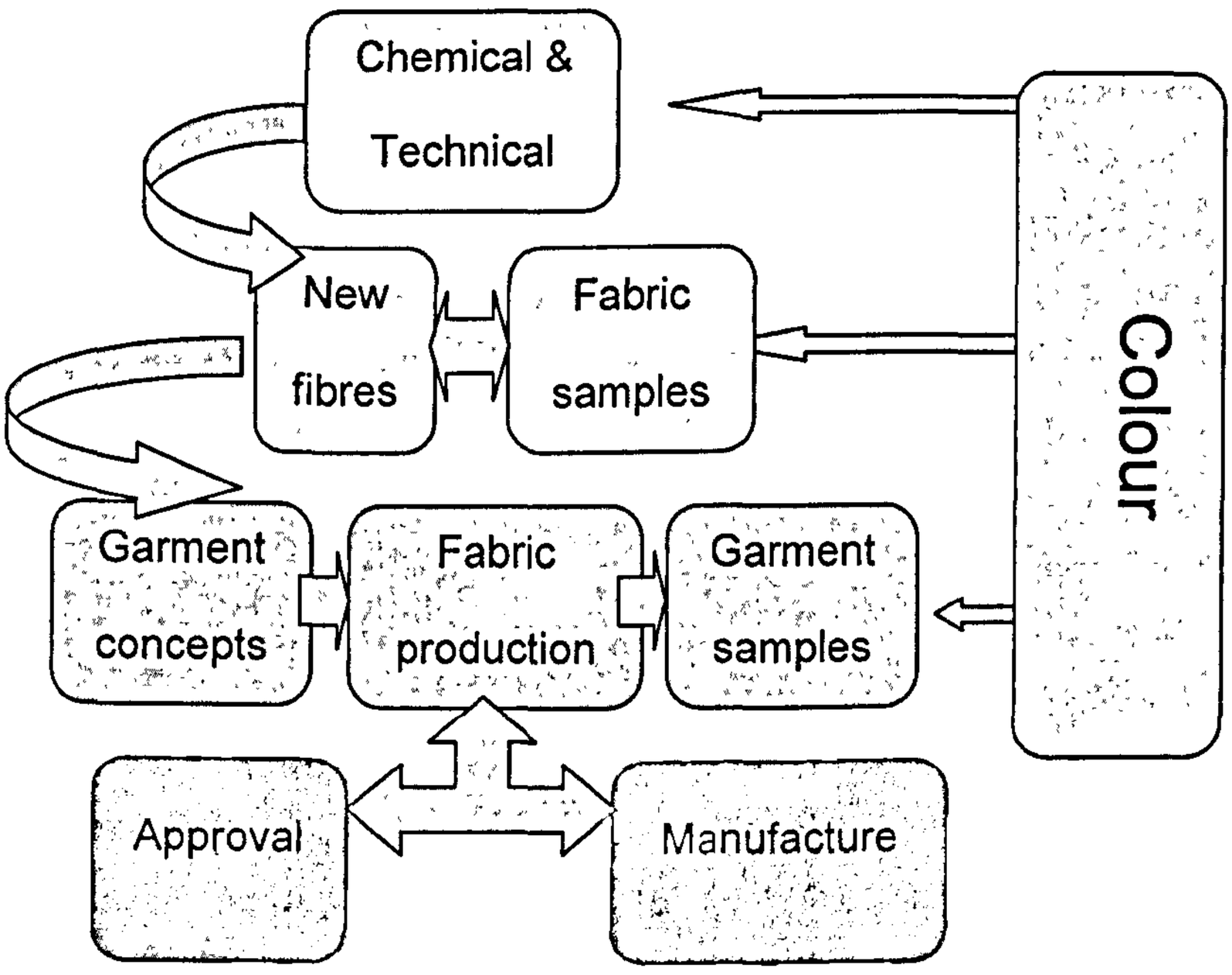


Figure 5-7: Colour input in the fashion development cycle developed by the author from Gaskill (1992)

This model would support some elements of fast fashion, as illustrated, colour is involved in all areas used at the first three tiers within the product development process; with fast fashion decisions regarding colour are made far more quickly, and can utilise existing yarn or fabric supplies, or indeed employ whole garment dyeing as a tool to achieve the relevant fashion colour within a short period of time. In such a case, garments could be made up in an undyed base yarn or fabric, commonly known as greige. The whole garments could then be dyed with trims or fastenings added post dyeing. Another option for some retailers is to over dye quantities of existing stock to create a new colour. This is most effective on white or light coloured garments, but can also be done successfully on darker colours, where the end result required is far darker than the original base colour.

As cycles in garment design and production shorten, increased pressure is exerted on the traditional early stages of concept development, as outlined by Carr & Pomeroy's 1992 model (Fig. 3.1). The process in compressed in terms of timings, thus specific activities

are subject to immediate influences, with trends being the foremost. Benefits to retailers who adopt fast fashion and quick response methods are tangible. Birtwhistle et al (2003: 121) discovered that benefits could be gained by:

'Making decisions on design and style of garments along with the colour ranges much closer to the time goods are required in the shops, thus reducing stock holding and the risks of wrong decisions.'

They further advocate adopting the fast fashion model, originated by Spanish retailer Zara, who only commit to buying 20% of their budget up to six months before the start of the season, the remainder being spent closer to the season. Birtwhistle et al (2003) concluded that for fashion leaders, speed is a priority, incurring higher production and distribution costs, which are then offset against fewer markdowns and higher overall margins. Kim and Johnson's 2009 study of the US fashion industry supported Birtwistle et al's views, 'speed is key. Supply chains will become more transparent to drive efficiency, save time, save money.' Such reductions on time in the garment development and manufacturing processes will undoubtedly cause some changes in the way in which colour information is gathered and published by the trend forecasters, as industry demands more immediate access to current colour information. However, with the use of colour update cards, online and mobile services, and flexible production, including the dyeing of yarns and garments, such a demand can no doubt be satisfied. It may also prove more accurate to develop closer to the season. For those creating their own colour palettes, and not purchasing commercially available forecasts, it allows them to be more flexible. A thorough understanding of their target market and consumer is therefore essential. Indeed, the results from the longitudinal studies discussed in Chapter 7 clearly illustrate some of the approaches employed by leading UK retailers to manage such shorter cycles and the demand for timely colour information.

5.7 Summary

The chapter has found that there are a variety of approaches and techniques used by trend forecasters, some working in groups, others alone. No one approach can be said to be more or less valuable, as they might suit very different product categories, cultures, countries, clients or trend publication outcomes. An understanding of how trends have evolved and moved through society using the various theories proposed over the last century allows an understanding of the fluidity of trends, and the importance of the initial, small group of fashion innovators, who can help to drive a product through to the mainstream, along with the trend forecasters. It has also been established that trends are moving faster today than ever before, and that all groups of society can be seen as contributing to the development of global trends.

Accurate colour communication and information has also been discussed, coupled with the importance of both the colour name and alpha-numeric colour referencing systems including Pantone, Scotdic and Munsell. Such systems have allowed global colour communication for many years prior to today's sophisticated and instantaneous online versions, and continue to be used as industry standards.

The chapter has also discussed why the accuracy of trend forecasting is important, and who it affects within the supply chain, and emerging issues impacting upon trend forecasting, in particular the role of fast fashion. The use of expert groups to develop trends will be explored further in Chapter 6, but it is clear that developing colour palettes for specific brands requires a thorough knowledge of core customers and market demands.

The suggestion that established cyclical colour trends could be used as the basis for developing more accurate trends was also introduced. This will be discussed and evaluated through the primary research in the form of the practitioner interviews, studying the developmental methods of forecasters, the longitudinal studies and the two retailer's management of fast fashion within an overall product development and buying cycle in chapters 6 and 7, and the investigation of colour cycles and colour trend archives in chapters 8 and 9. The primary research will provide answers to the main aim of the thesis, to investigate how colour forecasts are compiled and examine their use and influence within the fashion and textile industry, suggesting methods for developing more accurate methods in the future.

6 Investigating Trend Development Methods of Forecasters – Research Findings

'Why is colour so important? Because the ultimate consumer is quick to decide on colour. If consumers like the colour, the product is a giant step closer to the cash register; if they do not, the same item is a giant step closer to a markdown.'

(Guerin, 2005:47)

6.1 Introduction

One of the fundamental research objectives will be answered in part in the chapter: to establish how colour forecasting is compiled and identify similarities in influences and information sources used by the forecasters. Consequently the chapter will focus on the research questions related to this objective:

i. What are the key information sources?

ii. Are information sources duplicated by forecasters, designers and colourists resulting in homogenous trends?

iii. How are colour palettes developed?

These will be answered through an exploration of information sources used by forecasters, established methods and forecasting models, through primary research, observing two colour development panel meetings and assessing any commonalities in the sources of information used or the trends subsequently produced by those forecasters, and by a series of interviews with industry practitioners, forecasters, designers and retailers. How the development of colour forecasting materials impacts on its accuracy will be investigated. The chapter summary will identify if and how these models have been applied by the colour development panels and the fashion industry, and their efficacy.

6.2 Information Gathering Techniques

Most organisations involved in the broad area of fashion forecasting, encompassing colour forecasting, tend to publish their information at two major periods in the year, for the, Spring/Summer and Autumn/Winter seasons, and often feature core colours for both seasons in order to allow clients to visualise and subsequently build new colour palettes around existing, core colours. In conceiving new palettes and themes, the forecasters examine a broad range of inspirational source material, from lifestyle products such as cars, architecture and interiors, the arts, including new movies, music or exhibitions, or political, scientific and technological developments (Brannon, 2000, Mete, 2006, Raymond, 2010). As Guerin (2005:20) explains 'Effective fashion forecasters are tuned into all

influential areas of research in the global marketplace'. Rinallo and Golfetto (2006) refer to forecasting as 'a fairly institutionalized process' Raymond (2010) discusses 'stuff: new things in the culture' whilst influential Dutch forecaster Li Edelkoort:

'Travels constantly, listening, searching and shopping the world over, she taps into everything. Political, ethnological, artistic, literary and consumer movements all come under her scrutiny for analysis.'

McKelvey & Munslow (2008:102)

Research, and the inspiration gained from it, has been further cited by McKelvey & Munslow (2008:102) as being a key element of any new seasonal trend, and they suggest visual inspiration is sourced from 'exhibitions, galleries, artists shows and retrospectives, science, magazines, innovative design and architecture.'

'Observation of street style and travel around the world is an activity often described as 'cool hunting', the identification of consumption patterns in specific subcultures that in the experts opinions anticipate the directions in which society as a whole will move.'

Rinallo & Golfetto (2006:862)

Such a research-orientated approach to trend prediction has also been employed by Dee Dee Gordon at the US advertising company, Lambesis. When Lambesis were hired to develop new trends and a strong advertising campaign for Airwalk, the footwear manufacturer, Gordon developed a network of young correspondents around the US and beyond (Gladwell, 2002). The network fed information to Lambesis, from what clothes tenagers were wearing, to what new music they listened to. Gordon's 'sixth sense' helped to identify new products for Airwalk, linked to a slick advertising campaign. As Gordon said 'it's all about timing, you follow the trendsetters. You see what they are doing.' (Gladwell, 2002). Viral marketing has been credited with the success of a variety of products, and is something which many larger brands are now trying to channel, starting a small campaign with very specific groups of targeted consumers who can spread the word regarding a product far more successfully, and much more cost effectively, than a major marketing campaign might (Gladwell, 2002, Easey, 2009).

When such large amounts of inspirational materials are gathered, sometimes by a wide range of individuals, combining and filtering it into tangible, commercial trends can be challenging. With so many different ideas, products and influences a system is required which can aid the researcher in streamlining the inspirational sources into more coherent trends. Brannon, Sproles, Raymond and others have discussed a methodology, or series of tools applied to aid information gathering and focusing on specific trend directions, which will be discussed and compared with data gathered from primary research to answer the research questions.

6.3 *Brannon's Trend Development Model*

Li Edelkoort, arguably the most influential contemporary trend forecaster and founder of the forecasting organisation Trend Union, has suggested that the forecasting process is one that is artistic, intuitive, and impossible to apply objective investigation to (Diane & Cassidy, 2005). Edelkoort also used to develop the colours for the highly influential fabric trade fair, Premiere Vision, held in Paris twice a year. Her knowledge of forecasting spans several decades, with her publications such as View on Colour and Bloom, having considerable critical success, she has amassed a wealth of knowledge.

There appears to be no set methodology used to devise colour predictions within the existing literature, however, several commentators have proposed their own models for trend prediction development.

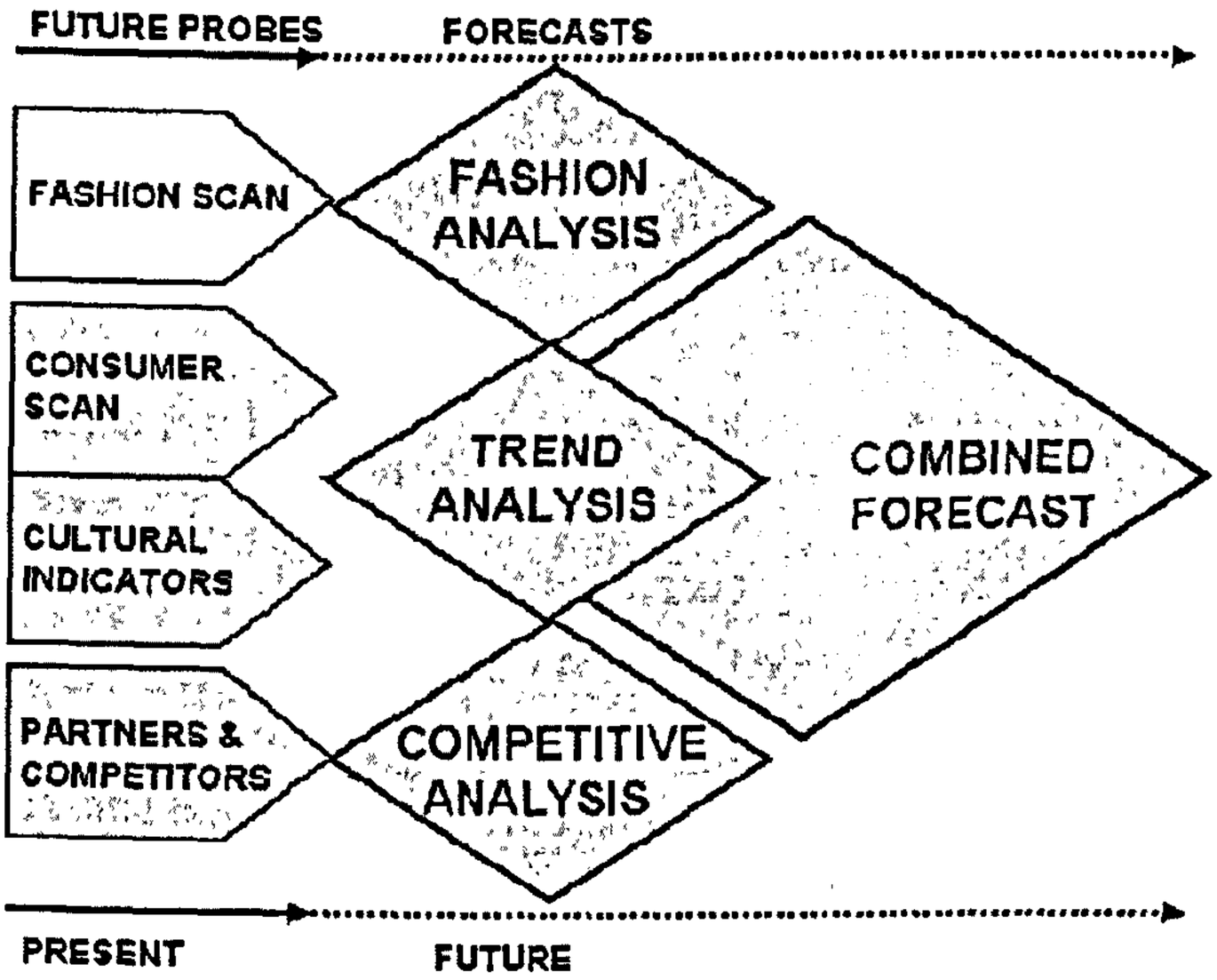


Figure 6-1: Brannon's information gathering model

As seen in Fig. 6.1, Brannon suggests that a forecast is an amalgamation or distillation of many different data sets. A relatively small part of this is fashion related with the remaining information sourced from consumers, culture and even competitors. By scanning or researching such areas constantly a number of analyses are made, fashion, trend and competitive. The fashion analysis relates simply to fashion, catwalk, high street or sub cultural, whilst the trend analysis encompasses a far wider range of information, consumer and lifestyle changes, political, scientific, economic and cultural aspects of society. Finally Brannon suggests a competitive analysis; this relates mainly to retail based operations, where the design teams need to be keenly aware of their competitor's products and performance. It is also possible that forecasters do monitor each other's predictions, and thereby benchmark their own work against others. Brannon's model is somewhat

prescriptive, and potentially limiting. Brannon further suggested a seven step model to developing a generic fashion forecast which articulates further Fig 6.1.

i. Identify basic facts about past trends & forecasts

ii. Determine causes of change in the past

iii. Determine the differences between past forecasts and actual behaviour.

iv. Determine the factors likely to affect trends in the future.

v. Apply forecasting techniques and tools.

vi. Follow the forecast to determine reasons for significant deviations from expectations.

vii. Revise the forecast when necessary.

At US fashion retailer Express, a division of parent group The Limited Inc., the product development team changed its concentration from a strict focus on merchandising to a team of specialists who monitor specific categories from denim to shorts to develop a more agile and fluid approach to product development (D'Innocenzio, 2000); the change of focus led to a stronger, clearer view on what they should be developing and buying in the coming season, or short phase within a season. Express utilised some elements of Brannon's principles, notably number four and seven, to determine future changes. Moreover, earlier suggestions toward developing a forecasting model or set of guiding principles were less detailed, more generic, as in the following section.

6.4 *Sproles' Principles*

In contrast to Brannon (2000), a proposal some twenty years earlier by Sproles (1979) highlights just two sets of values by which to develop forecasts.

1. General principles based on the changing environment of consumers.
2. Fashion-specific principles that can be used in forecasting coming trends in consumers' acceptance of specific styles.

There are some similarities in the content of each proposal, but consumers' changing preferences are obviously key to Sproles' proposal, whilst Brannon focuses on past, historical information in the first three steps. The two proposals are separated by over twenty years of progressive research and the quest for more accurate predictions driven

by a faster paced fashion cycle and highly competitive global market place. Arguably, Brannon reflects the notion that nothing is new in fashion anymore, as designers gather inspiration from a variety of different decades from the twentieth century with the imperative to revise forecasts and provide updates due to the vagaries of the fast fashion business today. At the time of Sproles' outline, the late 1970's, seasonal changes developed much more slowly than today, and the key trend publications of the time reflected the slower pace.

'A major fashion happening that happens only once in a decade...a change of shape. The new shape means a new, slim silhouette, a shape that tapers from wide shoulders, close in to the body, to a shorter, narrower hemline.'

(The IM Report Spring/Summer 1979, July 1978)

During a similar period of time in the UK the earliest British trend forecasting agency was working on a variety of market sectors, including specialising in knit, weave and printed textiles, colour and apparel. Deryck Healy International was established by its eponymous owner, and operated with a wide range of international clients. An extract from a brochure published circa 1978 identifies clearly that the creation of colour forecasts and their place in the supply chain has not changed since then.

'Colours are forecast two years in advance, relative to specific seasons. Yarn and piece dyed colour ranges are designed.'

(Healy, 1978)

Figure 6-2: Deryck Healy Studio colour room and early forecasts circa 1978.

As the colour calendar appears to have remained largely unchanged since the 1970's, it would be logical to suppose that both Brannon and Sproles' directions toward trend development strategies would still be relevant to the contemporary industry and currently being employed by the forecasting industry.

By exploring Sproles two guiding principles further it becomes clearer how little has changed in over three decades of forecasting.

6.4.1 General Principles

According to Sproles, general principles can be categorised into four key areas:

- The Economy
- Demographic Trends
- Technological Developments
- The Socio-cultural Environment

These are similar to those described by Brannon, who lists them respectively as:

- Partners and competitors
- Consumer scan
- Cultural environment

Each has a very different importance, or value according to the sector of forecasting being prepared. The economy may be of far greater significance in fabric or fashion forecasts, as a strong global economy may fuel a desire for more luxurious, detailed, and ultimately expensive garments. Conversely, if the global economy is weak, there may be more demand for lower cost clothing, or indeed, more interesting pieces in the middle market range to entice the consumer to spend. Ironically Brannon omits technological developments, arguably one of the most important aspects to forecasting today, but at the time not quite as important to Brannon's model.

Carlin, a major Paris based trend forecaster cites 'constant attention to market aspirations' and the study of major social, aesthetic, economic and movements' as the source for their trend predictions in their 2005 promotional literature. Such structure would imply a combination of both Brannon & Sproles' suggested methodology, but the adoption of the general principles being dominant.

Further suggestions to expand or modify some of Sproles or Brannon's principles might help in the adoption of a revised approach to the traditional trend forecasting methodology. The fashion industry has changed considerably since both sets of principles were developed and a new approach to trend gathering may be required for contemporary forecasters. Is there still a need to personally visit trade shows, catwalk shows, analyse past trends and conduct comparative shopping? Some favour of a more research orientated method (Raymond, 2001, Popcorn, 2000) which is not simply based on the fashion and textile industry. Such research encompasses changes in lifestyles, scientific and technological advances, new media productions, artistic movements, politics and even world conflicts and wars. Faith Popcorn, arguably one of America's most influential futurologists, oversees the Brain Reserve, founded in 1974. It has thousands of members around the world who contribute to the identification and distillation of Popcorn's trends, used by multinational organisations such as Kodak and PepsiCo. Raymond (2001:222) explains Popcorn's new method of trend research as what trending is really about:

'Not seeing in to the future, but searching the present for potentially viral items that are set to infect and pollute tomorrow's fashionscapes. So not a matter of crystal ball gazing then, but a careful mix of judicious research and knowing where and how to look.'

Timing is also acknowledged as being a crucial part of trend forecasting by Brannon (2000), Jackson (2001), Bruce & Daly (2006) and Perna (1987). The forecaster's clients need their information as far in advance of the season as possible to ensure all products areas have a firm colour palette developed prior to full range planning. Some forecasters are now distancing themselves from the traditional prediction agency image, taking on a wider, more holistic view of the industry and the ideas they promulgate, and therefore suggesting their concepts are more accurate as a result.

"They often compare their work to cultural anthropology, though few, if any, have formal training in that field. They're quick to differentiate the short-lived fads from decades-long trends. They usually stress that their predictions are rooted in hard data."

(Piccalo,2005)

Moreover, when so many commentators and practitioners are still using Sproles' general principles of forecasting, over thirty years since their publication, the implication is that they are tried and tested, and deliver viable forecasts.

6.4.2 Fashion Specific Principles

Sproles suggested that his general principles for forecasting be applied to construct a broad picture of future consumer demand, but that a further set of principles was required specifically for the fashion industry, and to develop fashion trends.

- Historical Continuity of Fashion Change
- Measurement of Fashion Diffusion
- Consumer Surveys
- Consumer Panels
- Test Marketing of New Styles
- Monitoring Major Centres of Creativity
- Trends in Consumer Expenditures
- Forecasts Using Quantative Models

These principles indicate a closer relationship with the consumer than Brannon's. However, it is far more difficult to apply all these fashion specific principles to contemporary forecasting processes although they did apply in the past according to Sproles; he argued that research into historical patterns of fashion change which indicated a relatively continuous pattern of change (Robinson, 1975) could be used. Arguably this may have been more relevant at the time when fashion still used two distinct seasons of autumn/winter and spring/summer, and the notion of fast fashion was unheard of. In contemporary retailing adhering to set guidelines regarding the changing length of hemlines would be unfeasible; new styles and trends emerge far faster now than in the

1970's. Likewise consumer surveys and panels although still conducted are usually not fashion related. When interviewed in 2010 for the research, Sian Edwards, Marks and Spencer Technical Manager Ladies Casualwear, Colour and Trend, indicated that fifteen years ago the UK retailer Marks and Spencer had thirty to forty womenswear colours in any season; today it has around 400; although the company still holds consumer survey groups, they rarely discuss specific colours or styles. Some styles are test marketed in the larger flagship stores, and quickly reordered if popular in greater quantities for a wider range of stores, but this practice is declining, again due to the advent of fast fashion and the rapid turnover of phases within a season.

Another of the fashion specific principles focuses on the diffusion of fashion, the number of early adopters, how quickly a trend is accepted and becomes mainstream, and its subsequent obsolescence. Effectively this principle relates to the fashion lifestyle curve, or the diffusion of innovation curve developed by Rogers. The curve can be plotted either as a bell shape or an s-shape and illustrates the percentages of consumers likely to adopt a specific trend, or product at any given point during its lifecycle, with the S-shape as seen in Fig 6.3. The yellow curve is the market share of the product, which will eventually reach a market saturation point.

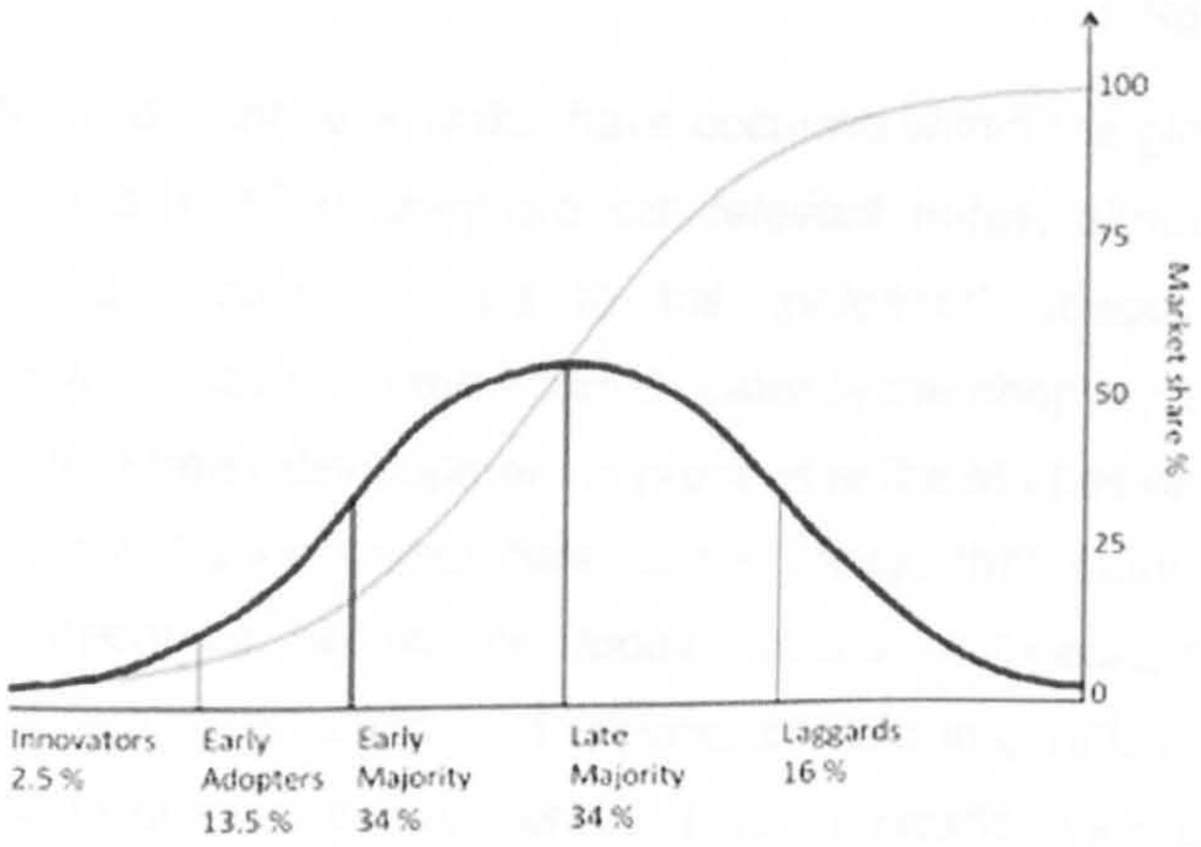


Figure 6-3: Roberts Diffusions of Innovations curve, 1983

The diffusion curve is still used extensively by some forecasters; Raymond (2010:19) refers to it as 'to describe how an idea, innovation or product development passes from the fringes of our culture into the Late Majority's mainstream.' Although Roberts's initial curve was based on research with farmers in Iowa, and their adoption of hybrid corn seed, Rogers realised that it could be applied to most new products and of particular relevance to fashion. When plotting potential fashion trends on the curve, or s-shape, the forecaster needs to be aware of exactly

where the trend is on the curve – ideally at the very beginning with the innovators, not early adopters. This is why Demettre from Carlin referred to the company as being in the middle ground as far as trends are concerned; the middle ground, early majority and late majority, represent the mass market, the most widespread period of adoption, and the best chances of a trends success.

Undoubtedly the monitoring of major centres of fashion creativity continues to be relevant, as cited by Brannon (2000), Guerin (2005), Bruce and Daly (2006) and Raymond (2010). Occasionally the importance of the centres changes, although Paris, Milan, London and New York have maintained their fashion relevance, new cities have developed strong creative reputations such as Tokyo and Antwerp, providing increased opportunities for trend research

Retailers routinely look at their sales figures generated by EPOS (Electronic Point Of Sale) data, usually on a Monday morning following the weekend shoppers and may discount some lines, reorder best sellers, replenish or even write off some stock based on sales performances, and even identify early or forecast demand (Sichel, 2008). The impact of EPOS from the retailers perspective will be discussed later in Chapter 7. Sproles concluded:

'No method of forecasting fashions is foolproof; however with the combined general and fashion specific principles for forecasting the analyst can construct a broadly valid estimate of future consumer behaviour.'

Sproles (1979: 213)

Given the considerable changes which have occurred within the global fashion industry since Sproles's comments in 1979, they are still relevant today, although the context of some principles may have changed due to the increased speed of the communications infrastructures now available via the internet. Later in the chapter, it will be clear that through observation of colour trend development in process at the studios of The Mix Bureau, London, one of only two UK based colour forecasters today, that elements of all the proposed methodologies appear to be utilized today; individual forecasters develop their colour concepts using a variety of sources of information and inspiration, interpreting lifestyle and innovative fashion trends into colour themes. Their publications are seen as a quintessentially eccentric British view on colour, although their colour development panel comprises experts from around the world, possibly subconsciously applying most of the principles outlined by Brannon (2000) and Sproles (1979) in their trend development.

6.4.3 Consumer Influence on Fashion Colours

Surprisingly, throughout the development of colour trends, the consumer has traditionally had little input or choice when presented with seasonal fashion colours. Brannon incorporates a fashion scan in Fig. 6.1, and Sproles includes consumers acceptance of specific styles, plus other consumer focused principles. Consumer colour preferences are of key importance when developing colour predictions, as the consumer has to be convinced that the new season's

must-have shade of raspberry is exactly what they require, but has not often been consulted during the development process. The reliance on the little black dress and a core neutral colour palette which is endlessly presented by most retailers and brands suggests a belief that basic colours will outperform fashion colours in their longevity.

Some have suggested that colour may be predicted as a reflection of the zeitgeist of a specific period in time (Stansfield & Whitfield, 2005) and society in general during a particular period.

Research by Cassidy (2007) using a small sample of 49 consumers, comparing their individual colour preferences with forecasted colours proved inconclusive. With so many diverse millions of fashion consumers globally, it is questionable that all consumers would find an affinity with all the colour trends presented to them by the retailers. Nor is it certain that each consumer would be able to find the colours which suited them personally according to their skin tone, hair and eye colour, as suggested by the *Colour Me Beautiful* personal image consultants organisation. Their consultants work with a client to produce a range of colours which they recommend the client wears close to the skin to flatter their individual colouring, irrespective of fashion colour trends of the time. This method was employed by Cassidy within research, but fails to recognise that the commercially published trend forecasts each season may not contain the colours prescribed by the *Colour Me Beautiful* consultants, and therefore consumers may not be able to purchase their 'personalised' colours each season. Bruce & Daly (2006) suggest buyers work closely with design teams to ensure the trend forecasts fit company consumer profiles, but that in some organizations as new colours emerge each season, they retain the flexibility to integrate them into production cycles. Essentially, such a policy allows a degree of modification to the original colour palette, so perhaps could be implemented as a result of consumer feedback or demand. In an interview for the research in 2011, Martin Raymond, founder of trend analysts The Future Lab, suggested that in today's society the consumer has a far more important role to play in the development of fashion than ever before. He believes that the rise in consumer power, online debates and bloggers are informed opinions which lend far more power to the consumer voice, sometimes influencing retailers to reintroduce discontinued products. If this powerful consumer voice could lobby retailers to use particular colours in any given season this would be a far more compelling case for consumer influence on colour selection. The evidence suggests that this has not yet happened. .

Some colours have particular resonance within cultures and so can influence colour selection to some extent. Blue has constantly been identified as a favourite colour by survey groups (Paul, 2002), perhaps the rise in the relaxed jeans culture in the twentieth century could account for the phenomenon, whereby 35% of the US population cite it as their favourite colour (Pantone, 1992). Early studies indicated that the least preferred colour amongst global

consumers is yellow (Eyesnck, 1941), yet today it is regularly presented by fashion retailers to consumers, lauded as the next big thing, it has been popular with retailers and designers for Summer and Autumn 2007, most recently predicted by The Mix, UK colour forecasters, whose seasonal overview in their Autumn/Winter 07/08 womenswear book stated:

'The general direction is towards saturated shades of yellow, purple , red... single head to toe colour and tone on tone once again look, fresh and new.'

(Mix Fashion, Future Womenswear #13 A/W 07/08:5)

Figure 6-4: Summer 2008 Yellows, Philip Lim, Alberta Ferretti & Dries Van Noten (source vogue.co.uk)

Such trend publications encouraging retailers and designers to develop head to toe colour lines, or tone on tone products, using colours which consumers may not necessarily have an affinity with or indeed purchase, are usually taken a part of the overall design development process, which may be influenced by a wide variety of factors. Striking catwalk collections do not always sell well when merchandised on the shop floor, and many pieces are never intended for commercial sale, rather as show pieces, guaranteed to make headlines. However, it is unclear how much input is taken from sales data on previous season's colour. Grossman and Wisenblit (1999) indicate consumers have different colour preferences for a variety of product lines from the traditional domestic 'white goods' which underwent a transformation in the 1980's when a wider range of colours became available including navy and bottle green, to cars where new paint finishes have generated a variety of changeant colours, and a widening of the range of metallics on offer. Such consumer products are seen as investment pieces, whereas in fashion, the designers and marketing experts offer products in a substantially wider range of diverse seasonal colours, consumers 'favourite' colours are not usually subject to change, remaining with them often through their entire life unless they experience substantial external influences, such as war, sudden economic changes or

relocation. Women tend to be drawn to brighter colours as they are more sensitive to subtle shading, although there is evidence that men are becoming more adventurous in their colour choices (Paul, 2002). Certain colours appear to be universally popular with both male and female consumers, from research in Japan, Taiwan, the US and Europe, and those remain blue and white (Ou et al, 2004).

6.5 *Colour Association with Specific Themes or Eras*

Traditionally certain colours or tones are associated with specific eras: during times of economic slowdown colours become more sombre to reflect the mood, or during a time when technology flourishes, futuristic finishes and metallics have become popular.

'Economic conditions also peturb colour cycles and start new ones. When recession or a steep drop in the stock market occurs, as in 1987, people's moods change and they curtail their spending habits. Japanese designers signaled the shift with their ominous black clothing and an austere minimalist look began the decade of the 1990s.'

Brannon (2000:131)

Many commercial forecasters such as Peclers, Carlin and Promostyl, predicted whites and silvers for the millennium in their Autumn/Winter 1999/2000 publications, reflecting the expectations of the period, the fascination with the Y2K bug, forecast to bring every computer in the world to a complete standstill at the dawn of the new millennium. The prediction was hardly startling, as white is a core colour, and winter whites are often featured in colour forecasts. Other research indicates consumers learn about colour associations for products and develop preferences early (Grossman & Wisenblit, 1999), and certain colours, such as blue, become fixed in consumer preferences (Pantone, 1992) Grossman and Wisenblit (1999) proved consumers had different colour preferences for varying product lines, whilst designers and marketing experts offer products in a range of colours, consumers 'favourite' colours are not usually subject to change. Particular colours also sell better in certain countries, for example dark reds and wine tones sell well in the US, and olive green more frequently in Europe (Burns & Bryant, 2002).

Musso (2008) suggested green issues were reflected during the 1990's in designer's use of colour, suggesting a colour can reflect and accompany attitudes and behavior toward environmental concerns, and this can be seen through the examination of forecasting archives in Chapter 8.

In 2005 Siden proposed three dynamic trends which appeared to reflect society's concerns about environmental matters, its preoccupation with new technologies, and with the cult of Hollywood celebrities.

- Green Desire: representing use of earthly materials and human nature
- New Space Age; representing technology, new order and neo-nomads
- Baroque Glamour: representing dreaming, Hollywood, neo-classicism and pattern profusion.

(Kim & Johnson, 2009:257)

Work by Cassidy (2007) adopted a methodology which omitted to reference the retail groups who exert substantial influence on the final in store product. One method of determining this further would be to engage retailers, and in particular utilise their EPOS data regarding colour sales, and this is explored further in the longitudinal surveys, Chapter 7. Further development could also be conducted with the forecasters, encouraging them to consider consumer colour preferences, rather than the ubiquitous blue and white, safe colours which they know will sell. Considering cultural and demographic influences further as Brannon and Sproles suggest when developing new forecasts for specific markets would be a step in the right direction. The research with the retailers indicated that few used forecasted colours extensively, preferring to develop their own range of colours, or use the brands signature colours. The influence of commercial colour forecasters seems, in most cases, limited

6.6 *Accuracy Rates in Trend Analysis*

If the thesis is to discuss methods of improving accuracy in colour forecasts, a position regarding the currently accepted levels of accuracy of forecasts needs to be established. Unfortunately there is little empirical data to support any of the figures found within the literature review, most being anecdotal, or entirely subjective assessments of forecasting accuracy. However, a position can be established from this. In apparel manufacture and retail terms, the range planning of products is the most significant aspect of strategic development. This begins usually a year to six months ahead of the season and many retailers refer to historical sales data in order to establish their performance against previous seasons (Brannon, 2000, Hipsey 1995). Retailers benchmark how accurate their products were in meeting market demand in order to predict future demand (Goworek, 2001). This is also referred to as forecasting: trend forecasting is a totally separate discipline to forecasting future sales demand. Forecast errors at this stage can be disastrous for companies with Bruce and Daly (2006) quoting figures of 50% in forecasting errors. Ekwall et al (2006:89) summarise it thus:

'Forecasting error is a phenomenon which arises due to the long lead times. This means that the longer the lead time, the larger the error. To meet this insecurity, companies tend to increase their safety stocks instead of reducing lead times.'

Sell through rates of merchandise were suggested by Bruce and Daly (2006) to be reducing to 50%. Information from the interviews with practitioners and the longitudinal studies in this chapter and Chapter 7 indicated that this varied considerably from retailer to retailer, and depended on whether products were high fashion lines or basics such as tshirts, socks or underwear.

These sources specified a range of different sell through rates. At Retailer A, a supermarket retailer, basics sold in core colours such as white, black, grey and navy experienced a sell through rate of almost 95% at full price, with only damaged or returned faulty stock accounting for the remaining 5%. Other merchandise would have a 75% sell through at full price at the absolute maximum, but some high fashion items, bought using fast fashion principles might have a sell through of up to 85%.

At Retailer B, a well known high street name with multiple own brands, sell through for basics such as tshirts, in core colours would be around 80%, but again it would considerably less for the normal stock, around 30-40% before markdowns and promotions began. Sometimes basic products such as tshirts, produced in high fashion colours might not sell as well, or printed garments in two different colourways often had one which did not sell as well as the other, so required further discounting.

One interviewee, who had worked at Laura Ashley, noted that there a good sell through rate after the first 6 weeks would be around 30% at full price, then discounting or promotional offers on merchandise would be considered, but much of their stock would be bought using traditional lead times, not fast fashion principles.

There were other factors which impacted upon the sell through at full price; the weather conditions, styling of a garment, the fabric finish, or how appropriate it looked within a range. Six weeks seemed to be the point at which most retailers made their 'judgement call', to mark down the item or not. Essentially the longer product remains in store the less chance it has of selling. Unfortunately, few of those interviewed actually said any decisions to discount merchandise were made solely on colour. Although these figures are not officially released in any format, there are obviously anecdotal accounts released. Indeed Jackson (2001) suggests that buyers and merchandisers simultaneously analyse historical sales data with a variety of complementary information sources such as trade fairs, overseas 'inspirational' shopping trips and customized forecasting services. So does this actually work in practice? Do the forecaster's accurately predict each seasonal trend, year after year, based on the range of information available from the retail industry and from inspirational sources too? More importantly, how can the sell through rates be correlated with the accepted rates of accuracy of colour forecasting?

Pat Tunsky, a colour specialist with the New York based Doneger group, interestingly believes there is less pressure on the forecasters to be accurate nowadays, as most retailers usually consult more than one trend publication (Franck, 2000), and does not admit to ever getting it wrong. Perna (1987) suggests that up to 80% of overall trend forecasts are accurate, whilst Cassidy (2007) puts the figure nearer to 50% writing twenty years later. From an interview with Martin Raymond in London during January 2011, he suggests 'there is a consistent 80/20 rule – 80% will be accurate but what about the other 20%? The minority is ironically no longer seen as a failure.' Raymond believes that the remaining 20% will sell to more open minded, independent consumers looking for new ideas. Jackie Nash, founder of colour forecasters The Mix, agrees with Perna and Raymond's estimate of 80% accuracy. Her company are the only ones to compare the accuracy of their predicted forecasts against other trend sources, so perhaps this lends more credibility to her estimate. Rickman & Cosenza (2007:611) posed the question does the fashion world do well in forecasting?

'Most would agree that predicting anything is 50-50 at best or more accurate by chance alone. The important thing to remember about forecasting is not accuracy but outcome. Fashion forecasting, like anything else, is an art and a science that depends a lot on the touch rather than the science.'

If 20% of forecasts are inaccurate, for whatever reason, this appears to correlate with evidence from the retailers regarding their sell through at both full price and discounted prices. However, the evidence has to be taken at face value as most of it is anecdotal with no hard data to support it. Also, many of the figures quoted regarding trend forecasting accuracy refer to generic trend forecasts and not to colour palettes, which are developed far earlier in the planning stage as evidenced by Diane and Cassidys model, Fig. 5.4.

Research at Master's level conducted in 1991 by McIlvenna indicated that 70% of designers in manufacturing and 89% in retail used trend forecasting. The widespread use of forecasting information by retailers is often used as an enhancement, supporting the decision making within the design and buying teams. Linda Robinson, the head of womenswear and accessories at UK department store Debenhams described trend publications as a 'fundamental tool' and 'the information backs up what we're thinking...it gives us a lot of confidence.' (Harvey, 1998). In the US, Diane Cisneros, fashion coordinator at Saks Fifth Avenue subscribes to more than one forecasting firm 'just to make sure everybody is on the same wavelength' (Franck, 2000) whilst Sharon Graubard, online forecasting organisation Stylesight's chief trend analyst, who trains the forecasters of the future, believes that a lot of the predictions are self fulfilling.

'If you tell clients something is going to be big, you will probably make it so.'

(Barnett, 2011)

The implication is that if a forecaster believes in their predicted trends, and has a large enough client base, they will see sufficient adoption of those trends to constitute it being a success and perceived as accurate. However, this does not account for the overall similarities shown in many colour forecasts, which is explored further in Chapter 9, section 8.9, Colour Accuracy and Update Cards, where three colour predictions are examined from two colour forecasting archives. This homogeneity is explained further in the next section of this chapter, in the results from the primary research interviews and the observation of two colour trend committee meetings. Information from the case study working with two large UK retailers also suggests there is less pressure to be accurate, especially as regular updates closer to the season are available from the major forecasters such as Peclers. These colour confirmations can sometimes radically alter the colour combinations initially predicted. Perhaps the forecasters working in today's fast fashion environment believe they are pressured to offer changes and updates closer to the season, specifically in response to the vast amount of material now circulated via the internet and viral campaigns for specific products, bands or movies which influence trends. Certainly from the interviews and case studies, it is apparent that many organisations do as Tunsky suggests, and purchase a variety of trend books for comparison. However, having been in the fashion industry since the mid 1970's, working in advertising, retail and forecasting, Tunsky has considerable experience to help her develop predictions, using many of Jackson's complementary information sources to evolve trends. Each of these elements allows the development of more accurate overall fashion trend analysis, including colour, and subsequent development of new product ranges.

There is no information to suggest that Tunsky has got it wrong, or advocates less accurate, well researched predictions, but perhaps this is due to a lack of information or follow up on predicted trends from the company, who are of course, keen to emphasize their successes (Franck, 2000). By purchasing a wide range of trend information from a variety of sources, users are able to distil a clearer picture of what might be classified as the major seasonal trends; those which are repeated by a variety of different prediction packages. Perhaps a certain group of fashion colours can be gathered in such a manner. It could undoubtedly provide a 'failsafe' for those designers, retailers or manufacturers who might be uncertain of their own judgement, or who are operating in more international markets, and need a broader view on colour trends, and provide them with a greater chance of accurately meeting the market demands.

This theory could account for Perna's high percentage of accuracy if her information was based solely on anecdotal information from forecasters rather than qualitative data and research. Paris based Carlin Group suggest their trend predictions 'don't just come out of thin air: they are based on our designers expertise and upon analysis of market developments.' (Carlin, 2001). They also cite research in major social, aesthetic, economic and artistic movements as being major contributory factors in the production of forecasts, similar to Brannon and Sproles's suggested methodology, and once again promote their accuracy and

ability to assist in the product development, styling and marketing processes. However, it is unclear as to how accurate colour trend analysis has been specifically in the fashion and colour forecasting industry, primarily as there is little verifiable evidence available on the subject, especially at an academically recognised level; secondly, as the retailers and forecasters themselves appear to keep few historical or comparative records; this could be predominantly because many analysts believe it is difficult to accurately predict change in such a dynamic industry. To date thirty five colour forecasters have been identified by the research worldwide, using the definition of a colour forecast organisation as one which published trend books and information for commercial purposes (Fig. 4.8). The publication of something tangible is the crux to inclusion and acceptance for the purposes of this research. These parameters were outlined earlier; whilst there are innumerable agencies, consultancies and studios offering colour trend information for the fashion and textiles industries, many do not publish any of their work. Instead, they provide bespoke services for individual clients, aligned to niche markets or products, specific demographics or geographic factors, and not for publication or general consumption. Forecasters offering books featuring their colour predictions for general purchase are the ones which are specifically examined for purposes of the research. It would be almost impossible to gather bespoke information from private clients of all the other trend forecasters operating today.

Colour trend publications may be supported by other commercial activities, such as consultancy, product development or client briefings. There are further organisations involved in colour trend development and forecasting, perhaps working for clients on an individual basis, who do not publish their predicted colour trends; such organisations can range from individual colourists, to much larger organisations based around the globe. These have not been included as a part of the mapping exercise, as their material is largely unavailable for examination and evaluation

With a lack of documented or qualitative evidence, the accepted accuracy rate for colour forecasting as evidenced by the literature and primary research, will be accepted, for the purposes of this research as the majority view of 80%. From the retailers evidence, basic products in core colours can sell through at 95% without discounting. This would indicate the best accuracy rates overall, but with products that rarely change and with an established market. In general, a fashion sell through without discounting is approx 30 – 40%, and overall sell through is around 80%. If colour forecasts could be made more accurate, or adapted by retailers to meet their specific needs, could an improved sell through rate be achieved? This is the aim of the research.

6.7 *A Practitioners Approach to Sourcing and Evaluating Information – Research Findings*

Further substantive investigation of how commercial colour forecasts were developed were planned in order to respond to one of the major objectives, how colour forecasting is compiled

and any synergies between the information sources used to compile the forecasts. Consequently, two colour trend development meetings were observed, one with the commercial, specialist colour forecasters Global Colour Research Ltd of London, publishers of The Mix colour trend books. The second observation was conducted with a non-commercial trade body, The British Textile Colour Group (BTCG), who compile colour trends twice yearly as a part of the global colour association, Intercolor. Each group convenes a panel of colour specialists to discuss their seasonal concepts surrounding colour and arrive at a colour consensus. The nature of the two organisations, one commercial, one not-for-profit, the observation and documentation of the meetings, provided a valuable insight into the nuances of the process when very different commercial drivers were employed.

A series of interviews were carried out with a variety of individuals connected with the forecasting industry, designers and retailers. The interviewees could be broken down in to three distinct categories.

- Forecasters & their agents
- Designers & users of the information
- Retailers

Representatives of most of the major forecasters were interviewed with their profiles given below. It was deemed essential to interview as many of the major forecasters identified from the forecasters mapping exercise as possible and many of the agents were deeply involved with the development and dissemination of colour trends, thus were able to comment authoritatively. As a result representatives from Peclers Paris, Carlin, Nelly Rodi, WGSN, The Mix and The Future Lab were interviewed. Trend Union were also contacted and provided useful information, although an interview with Li Edelkoort in person was not unfortunately, possible. Although an interview was arranged with Promostyl, it was cancelled at the last moment, and subsequent attempts to rearrange were unsuccessful. Communications via e-mail did not elicit any responses to questions, although these had been promised. The developer of the Pantone colour book was also interviewed, providing an interesting and well rounded picture of the practices of the major forecasters outlined in the earlier mapping. A List of those interviewed, their role and organisation can be seen in Fig 6.5.

Name	Role	Organisation
Janet Holbrook	UK Agent	Peclers Paris
Lynette Southall	UK Agent	Nelly Rodi
Jane Kellock	Trend Think Tank Manager	WGSN
Alison Hughes	UK Agent	Carlin

Jackie Nash	Publisher & CEO	The Mix & GCR
Sandy McLennan	Joint Partner & Creative Director	East Central Studios/Pantone colour book
Amelie Roberts	Colourist & Print Designer	Top Shop
Russell Thorpe	Colour Director	Timberland
Ros Hibbert	Joint Partner (Trends)	Line Consultants
Joanna Bowring	Colourist, Chair BTCG	Ex Marks & Spencer Senior Colourist
Marie-Christine Viannay	Colourist, Director	EM-Cee Designs
Denise Ford	Freelance trend consultant	Ex Courtaulds
Glenda Hansford	Womenswear Buyer	Next
George Davies	CEO & Founder	Per Una
Kate Bostock	Executive Director	Marks & Spencer
Sian Edwards	Technical manager ladies casualwear, colour & trend	Marks & Spencer
Martin Raymond	Co-Founder	The Future Laboratory
Jane Barry	Ladieswear Designer	Shop Direct Group

Figure 6-5: Interviewees, occupations and organisations

Dates of the interviews, plus the base questions used can be found in Appendix 1, with a fuller profile of the individuals interviewed and their roles in Appendix 3. The structure of the interviews was adapted according to the interviewees profession; forecasters and their agents were asked more questions directly related to the initial inspiration and development of the forecasted trends, what tools they employed, how they assessed accuracy, and future directions in forecasting. Some were happy to answer questions regarding how their clients used the information, and which were their main markets, but others declined.

The designers and users of trend forecasting information were asked about their personal approach to trend development, inspirational sources, and how they specifically used commercial forecasting publications within their design development processes. They were also asked about the accuracy of trends and the longevity of colours within their own particular organisation, and how that linked to future colour developments, or specific colour 'signatures' within their own brands.

The retailers questions focused on the trend information they purchased, and why it was purchased, how it fitted into their critical path and worked within the supply chain. They were also asked about market forces, customer profiles and later interviews included questions specifically related to EPOS data and the influence it had on colour decisions.

The questions did vary slightly from one individual to another depending upon the responses given and the willingness of the interviewees to answer specific questions, and of course, the amount they were prepared to reveal regarding their own particular organisation.

6.7.1 Inspirational Sources

This was a key element of the research, and most interviewees were asked about their sources of inspiration when developing colour palettes as it was equally applicable to the forecasters, designers and to some retailers. Several synergies emerged which appeared to indicate that forecasters did not always consider the accuracy of their previous forecasts when considering their new predictions. Using a grounded approach to examine the results, the interviews were coded according to similar quotes, sentences and words. The words, phrases and sentences were set into a range of different tables (see Appendix 2), which were subsequently broken down even further in to the tables illustrated in order to ease analysis.

These were further dissected into abstractions to establish what drove individual's inspiration and their personal colour development process, much in the same way the longitudinal studies were examined. Initial observations were categorised, as can be seen in Table 1, Sources of Inspiration, the main categorisation featured is 'colour trend development tools', which attempted to follow a combination of Brannon and Sproles's guidelines, plus any additional methods identified.

These were then extracted as 'second level factors' which are the main tools cited by the interviewees, namely Discussion, Socio-Cultural Factors, Research, Trade Information, Purchased and Additional Factors. These did not quite follow the earlier models in that some were more generic, such as Research. This covered aspects of consumer trends, consumer research, visiting creative centres and travelling, and catwalk fashion trends.

From this column three was developed, 'Detailed Information' which listed the different sources of inspiration for each interviewee; many appeared to be the same or extremely similar given the wide range of roles in which they were employed.

Finally the 'Narrative' was included, which used the actual information supplied by the interviewees regarding a particular section. All the interviewees were included in the analysis of the inspirational sources, but some clearly had more relevant comments and stronger views than others depending on their roles and the level at which they were involved with trend development. The results can be seen in Table 1, Sources of Inspiration, and Figure 6.6, Sources of Colour Trend Inspiration. Table 1 illustrates the inspiration which interviewees cited when developing colour trends, including forecasters, designers and retailers.

Initial observation	Second level factors	Detailed information	Narrative
Colour trend development tools	Discussion	Brainstorming	Panel meets to discuss colours and decide what will go in the trend books
		Comparison	Used panel of colour experts to develop trends
		Synthesis of ideas	Develops early colours & surfaces which is quite conceptual & broad.
			Think tank & early colour meeting, 2 or 3 per season.
	Socio-cultural factors	Music	Always looking at lifestyles
		Exhibitions & artists	Travelling, music, clubs, exhibitions.
		Nightclubs	Recording socio-cultural aspects including music, exhibitions artists and lifestyle trends
		Lifestyles	Nightclubs
	Research	Consumer trends	Catwalks push certain colours forward through their collections.
		Consumer research	Retail trends, catwalk & trade fairs
		Spinners sales of yarn	Spinners produce graphs of sales figures for colours
		Travelling	Team go to trend presentations, buy trend books eg The Mix.
		Sales data	Consumer research, work with brands advising on marketing campaigns.
		Catwalk trends & shows	Tend to look at the major catwalk shows
			Used colour from catwalks – things began to blur as only 6 months ahead timings too tight
			All look at the same catwalk images, the street and seasonal directions.
			Change information regularly and don't stick to one constant formula.
	Trade information	Trade fairs e.g. Premiere Vision, Moda In, Pitti Filati	Travel to shows, attend colour seminars, visit fabric mills.
			Travel internationally visiting trade shows, fashion shows,
			Team go to trend presentations, trade shows
			Occasionally trade fairs
		Fabric mill information	
		Yarn spinners information	
		Fibre company information	
	Purchased	Trend forecasting books	Colour analysis from all the trend books and sources to compare them
			Colour trend books
		Attending trend seminars	Trend books, Li Edelkoort as a consultant, trade shows
			Subscribe to Peclers & WGSN
		Garments from international travel	
		Generic trend	

		reports	
	Additional factors	Intuition	I enjoy being intuitive and researching – looking at the world
		Don't want to copy	It is intuition first and you have to work with it then research.
		Do what feels right	Do what fees right on an instinctive basis 20% intuition, 80% sales research Bring in intuitive colours I don't want to copy suggestions, I want to come up with my own ideas each season You very much get a feel for it Allowed to develop own individual ideas & use instincts Industry reacts to things instead of using its instinct

Table 1: Sources of inspiration

The table illustrates a number of factors which were cited by those interviewed as being of consideration when developing colour trend ideas and is extensive. Many are similar to those indicated by the retailers in the longitudinal survey, outlined in Chapter 7. Indeed, by comparing Table 1 with Figure 6.6 which shows the retailers colour information sources, it becomes even more apparent that those involved in the colour forecasting and development process use essentially the same sources of inspiration, be they a commercial forecaster, designer or retailer.

6.7.2 Intuition as a Colour Forecasting Tool

From Table 1 a model was developed to illustrate how those interviewed used their sources of inspiration, shown below.

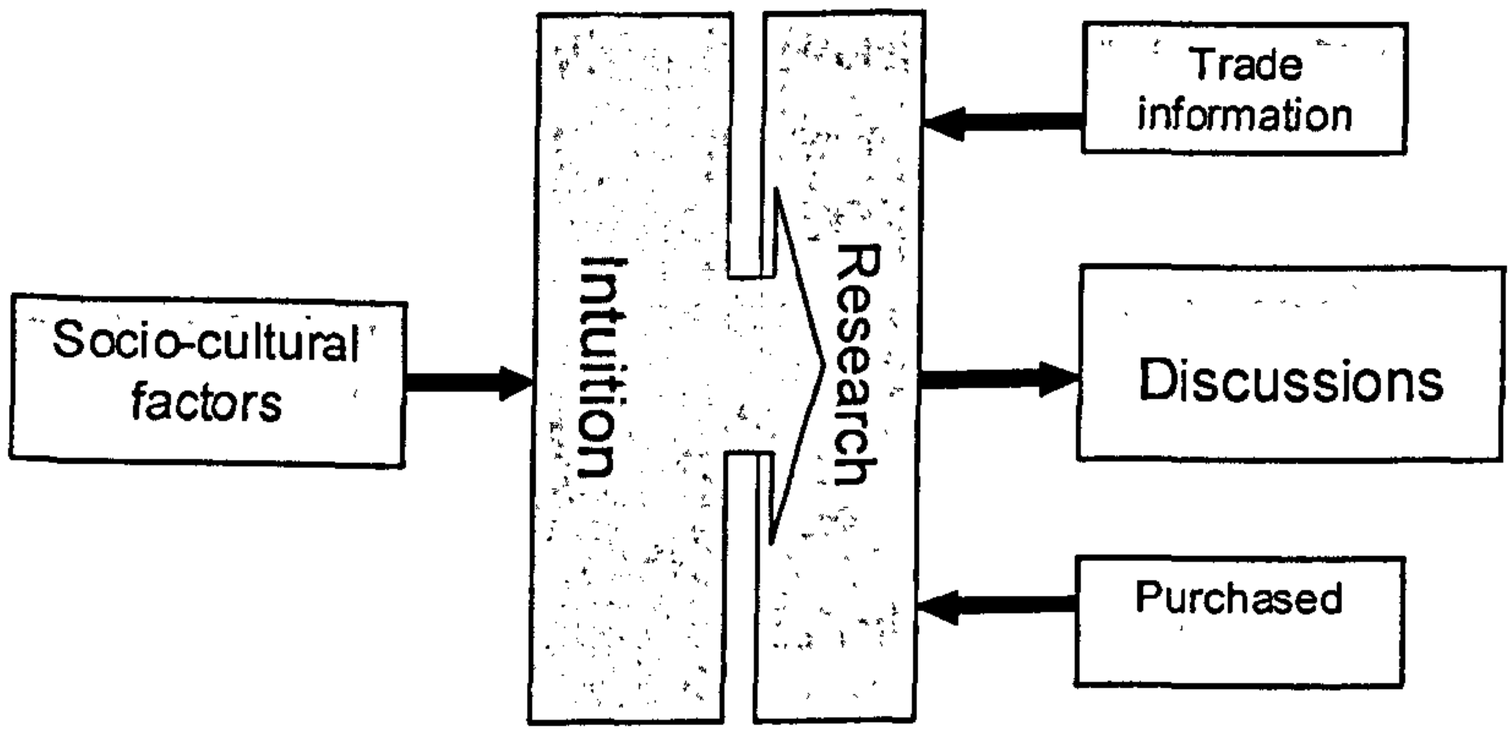


Figure 6-6: Sources of Colour Trend Inspiration

As Figure 6.6 illustrates, intuition which emerged as the conclusive area which those interviewed agreed on. Intuition fed into their research and was influenced often by socio-cultural factors or the subjects own life experiences. These in turn were used in the discussions and developmental meetings. *The Oxford Dictionary* quantifies intuition as 'the ability to understand something instinctively, without the need for conscious reasoning.' Most interviewed said that they used intuition in a similar manner, without questioning it, as a part of their colour development process, whether it be the forecasters at the beginning of the trend development cycle, over two years in advance, or those working much closer to the season. Indeed, it is an opinion supported by many, including Chris Gilbert, creative director at American trend agency, The Doneger Group speaking to Spear in 2006:

'It's partly gut reaction, influenced by politics, culture, music, film, art, home and technology.'

(Gilbert, 2006:23)

Denise Ford, a trend consultant who had worked in the industry for almost 40 years, created her own photographs to match the colour themes she worked on and used fabric swatches and yarns rather than colour chips to illustrate the colours she develops. She 'enjoys being intuitive and researching – looking at the world.' Her view is also supported by other trend consultants interviewed. Sandy McLennan of East Central Studios interviewed in 2008, who produce the colour books with David Shah for Pantone believes 'it is intuition first and you have to work with it, then research to see how the idea goes, play with it to develop colours.' Li Edelkoort also cites intuition as playing a major role, in an e-mail to the author from her personal assistant Philip Fimmano, it was explained thus:

'Li's colour forecasts are a combination of her precise vision of colour in the international consumer market, mixed with a strong sense of intuition to follow her colour cravings when considering where colour is going for in design.'

(Fimmano, 2009)

The strong emphasis on intuition correlates to similar comments regarding forecasting in the key publications examined in the field Brannon (2000), Perna (1987) with Cassidy (2003) and Sherrill & Karmel (2002) all cite intuition or gut instinct as a part of the analysis and synthesis of information in to final published or implemented colour trends. Sherrill & Karmel (2002:13) credit intuition with aiding the entire design development process.

'Their intuition and colour predictions influence the fabrics and trims, the silhouettes and textures that beget the sketch, then the sample, and finally the garment.'

Eckert, when examining the inspirational sources of knitwear designers, linked intuition with prior knowledge of the sector to explain its importance to the designer.

'By looking primarily at other garments or photographs of garments, designers learn about the space of possible designs. They develop a feeling for what would look outdated, what captures the mood and what would look just strange. Gaining this intuitive understanding is one of the most important skills of a designer.'

(Eckert, 1997:9)

Cassidy (2003) examined the notion of intuition in some depth, but failed to reach a conclusive view on how it was employed by the forecasters who attributed it to their toolbox of development information. Intuition is an ephemeral concept; individuals have different opinions on what it constitutes and as such it is near impossible to quantify or pigeon hole (Cassidy, 2003). Raymond (2010) devoted an entire chapter to *Intuitive Forecasting*, defending it as a valid research tool when supported by research based methods.

'Organisations may invest millions on the pronouncement of a forecaster, so these intuitive hunches must be underpinned more robustly. For most intuitive forecasters this is difficult as they do not know how they arrived at their conclusion.'

Raymond (2010: 68)

Raymond argues that intuitive forecasters are 'naturals' using their whole brain to reach specific conclusions, but also discusses the concept of other types of intuition which a forecaster might employ. These would include:

- Gut intuition – an ordinary instinct, using experiences and memories subconsciously as a reference point
- Expert intuition – gut instinct plus experience and knowledge gained from working in a particular field for many years
- Strategic Intuition – draws heavily on the previous two but can be applied to situations or events which the individual has no previous knowledge of

Eckert's research suggests that intuition regarding design decisions is based on knowledge and experience, not simply a hunch, as Raymond initially suggests. In this case, expert intuition would be the most applicable title for those involved in the creative process. What is certain from the comments is that it is undoubtedly employed by a large number of forecasters and trend consultants as they assimilate their research and devise the new colour palettes each season, and appears to work on all levels which Raymond (2010) suggests. In an interview in 2011 in London, he also suggested that intuitive forecasters had changed the colour trend development process.

'Colour communicators were using a standard formula of five colour palettes each season, so the colours weren't changing very much. As colour development became

more intuitive, people became more interested in it and the traditional way of developing seasonal colours began to change.'

(Raymond, 2011)

Contemporary forecasters intuition appears to be just as important a component in the development process as visiting trade shows, examining lifestyles, culture, or catwalk trends. Indeed these would contribute overall to both gut and expert intuition by adding to the experiences and knowledge of the forecasters as they work as examined by Le Pechoux et al.

'Creativity results from synergistic interaction of intellectual, intuitive and emotional intelligence. Therefore the creative mind combines a complex combination of various abilities, knowledge, skills traits and needs.'

(Le Pechoux et al, 2004:156)

This is further supported by Waters (2005) who believes that intuition and instinct go hand in hand and are an indispensible part of the trend industry, not only in fashion and colour: 'if it weren't for visionaries who knew how to go with their instincts we'd be living in a world without post-it notes, FedEx and Starbucks double tall skim lattes.' At online forecaster Stylesight, Sharon Graubard, their chief trend analyst believes:

'Forecasting is a sixth sense. You can be too early. You can also let your own taste get in the way. But usually you can feel a trend bubbling up on the streets and then you find the seeds of it on the catwalk. Our job is to pull it all together for client and educate them about how best to channel the zeitgeist.'

(Barnett, 2011)

Such evidence from the forecasters themselves suggest expert intuition works in many ways, based around prior knowledge and experiences. As outlined previously, if a forecaster believes in their concepts, and has sufficient clients who also believe in their concepts, the likelihood is that there will be sufficient critical mass to deem those concepts successful. It is relevant to consider at this point that not all these comments would refer specifically to colour forecasting, where experiential learning, repetetitive colour cycles, and colour combinations should all be considered as a part of intuitive forecast development.

The brainstorming sessions which some interviewees conducted to develop trends should be classed as a similar ephemeral concept; ideas discussed or presented at such sessions tend to be at the initial phase of development, and as such are often subject to instinct and gut reaction prior to the hard evidence gathering and analysis of the more tangible aspects of trend development, the catwalk shows, trade fairs or colours from

spinners or yarn companies produced far earlier in the fashion cycle. When considering such sources of inspiration, McKelvey and Munslow (2008:123) cited numerous possibilities:

'Inspiration, where does it come from? It is derived from exhibitions, galleries, street style, science, culture, even shop windows. A good background knowledge about art, art movements, culture and historical events helps in terms of reference of inspiration; this combines with the 'contemporary' to bring new fashion looks to the consumer.'

McKelvey and Munslow suggest that an individual's ability to process, or interpret visual inspiration and sources of information, synthesising it into tangible forecasting trends relies very much on the individuals personal knowledge of numerous subjects, and thus how various trend developers each interpret the same pieces of visual data will vary considerably, much as Raymond (2010) and Le Pechoux et al (2004) do. This is where intuition or gut instinct can be linked to experiential factors. It is clear that the more experienced the forecaster, and the longer they had spent in the industry, the broader their background knowledge of trends would be, having experienced numerous annual cycles of colour and fashion trends. Inevitably stored knowledge would be referred to in the creation of new trends, whilst seeking out additional information to support their ideas from contemporary sources. In this instance, when designers and forecasters refer to their instinct, they may actually be referring to their subconscious experience and knowledge base as suggested by the Oxford Dictionary. Applying this theory, Fig. 6.7 can be modified to incorporate the experiences of the individual and the result it may have on the sources of inspiration.

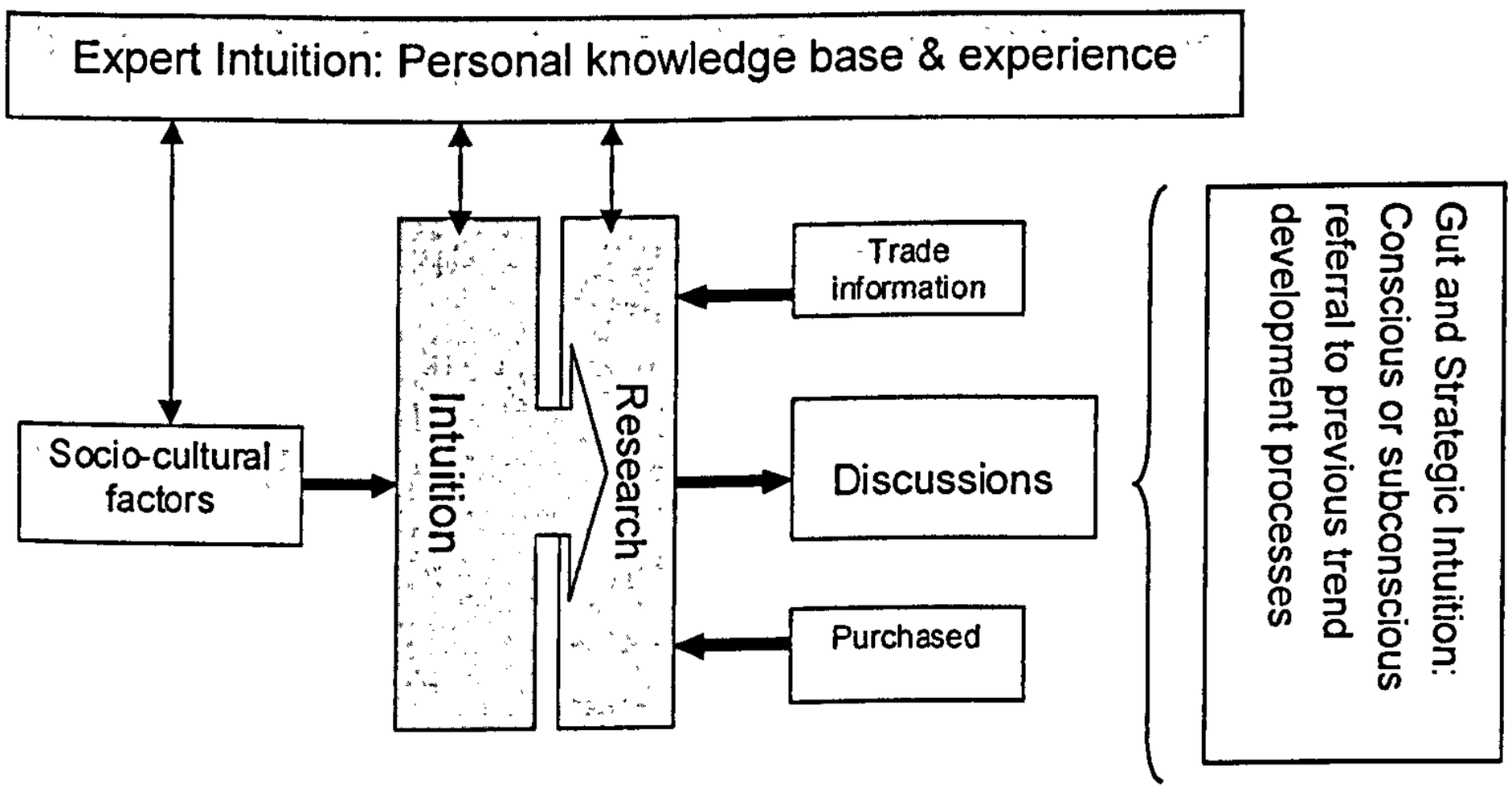


Figure 6-7: Influence of Intuition on Inspiration

Expert intuition, the personal knowledge base, is used implicitly throughout the research phase, whilst gut and strategic intuition is used to bring together an instinctive response based on the discussions resulting from the research and application of expert intuition. All of these elements combine to develop the final trend concepts within the model. This can be further illustrated through the analysis of interviews in section 6.8.

6.8 *Influential Factors in Colour Selection*

The interviews revealed a number of interesting issues related to the influential factors on forecasted colours and what may impact on forecasts in the future. The full results are shown in Table 2, Influences on Colour Forecasting. The sections for this were broken down as in the previous table using a grounded approach into the Initial Stage, Second Level and Narrative from the interviews.

Initial stage	Second level	Narrative
Market Forces	Increased competition	Industry consumer led & more competition on high street
		Subscriber base growing all the time crossing a wide variety of products, looking at more niche products and fast fashion.
		Don't benchmark themselves against other forecasters
		Quick response allows new trends to emerge; celebrity trends & Grazia drive it
	Cultural differences	Different nationalities see colour differently
		French colours are different to UK
		Promostyl are known for producing a pastel S/S palette which is very French & fresh looking
		French use 1 colour theme to permeate through their 4/5 colour stories
		British colours more adventurous
	Design skills	Have to be very diverse as a designer now able to cope with change
		Some colours work on specific products
Longevity of palettes	Trend monitoring methods	The starting point is to look back at previous seasons trends so the company is always progressing trends forward based on what has gone before.
		They track colour trends & feature 3 seasons at back of their trend books
		Mapping & tracking of trends in the books.
		All colour trends are archived on site, so customers can see what has gone before and compare forecasted colours if they want
		Ongoing evolution of key macro colour & fashion trends tracked in books
	Core/signature colour use	Clients use their own signature colours each year
		Bring in new colours for freshness
		Always use core colours but try to move them on a bit by linking them to key trend colours
		I can't just throw colours away, but instead move on in a very incremental way.
		The company uses white, black and navy year on year
		Red, Grey and black cycles are repeated endlessly

	Personal opinion	Not appropriate to say this is a red season anymore as not one colour group dominates. Nothing ever new simply a different slant on things Trends are no longer seasonal Teal and magenta never work; Cobalt blue is only for the younger customer.
	Historical background	Colours in fashion evolve and change very slowly, even today If buyers don't feel it's right, they carry over the palettes to the next season or change drops in store to reschedule trend. In 80's & 90s everyone threw them away at the end of each season and then started all over again so it was kept fresh Colours move at different speeds nowadays, green has been around for a long time, blue is in the ascendant but has been a long time coming Keep core colours from one season to the next; this season yellow is very strong, a colour which traditionally doesn't sell well in the UK. Colour in fashion comes back around more quickly today than ever before. Used to have strict rules regarding repeating colours too quickly. In 1970's not many sources of information so forecasters very important.
Accuracy	Sales success	People want to know if it will sell, that's all In fashion & interiors about 80%- have always compared their palettes with trade show palettes Grey did not do so well over A/W 2007/2008 but they don't have feedback from retail customers.
	Problem colours	Grey is difficult to get right Main problem with colour came a few years ago with Grey. It became so dull, but it was the interpretation of it by the high street, not the colour. Industry trusts forecasters more than their own in house design teams
	Benchmarking	We compare with trade show colours
Future directions in forecasting	Fibre developments	Technical developments at materials stage Colour can innovate through new transparents, metallics, pearlescents. They will gain more from the fabric developments than from colour Fibres leading development is over now with the major cut price Chinese mills – it hasn't translated well
	Internet	Big issue is books vs. internet Not viable to provide colour forecasting in the traditional way anymore. Developed an online trend service but not as popular as they had hoped
	Market	Leading things will always come from the high end of the market Driven forward now in terms of more trend development.

Table 2: Influences on Colour Forecasting

The table highlights a number of interesting facts from the interviews, including the French way of looking at colour, focusing on one colour permeating through all the palettes – important due to the fact that most of the major forecasters are based in Paris, and the problems with certain colours, such as grey. This supports Guerin (2005) who suggested that the European forecasters see colour differently due to climate and the strength and clarity of light experienced in Europe in comparison with the USA.

The key areas which appeared to impact most substantially, according to the number of times they were raised in the interview series, included the following:

- Influential factors
- Longevity of Colours
- Accuracy
- Future Directions in Forecasting

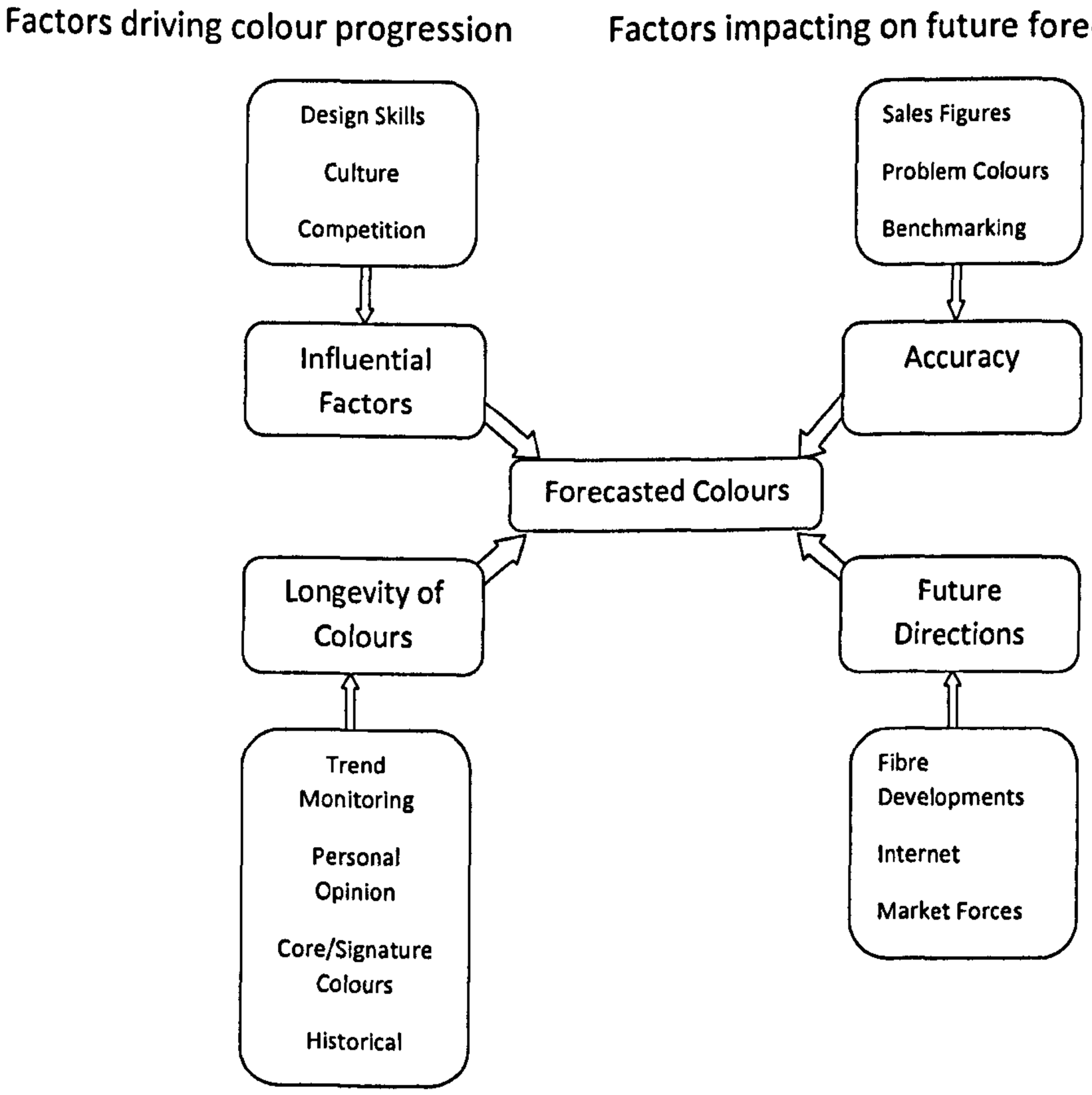


Figure 6-8: Key forces determining colour

As illustrated by Figure 6.8, there were a considerable number of factors impacting upon the development of forecasted colours and impacting upon their future development identified from the research, but interestingly at this stage did not mention intuition as a guiding factor, although personal opinion was cited. This may be because at this point the forces were more business than design driven. The left of the diagram illustrates the key forces surrounding the influential factors determining colour, and their longevity in the market. Typically, influences incorporate cultural drivers, in particular the comments regarding the way in which different nationalities conceive colours. Comments included the assertion that French colours, in particular, were easy to identify. Design skills and abilities were also cited as primary influences, focusing on the importance of looking across product ranges when developing colour trends. It reflects the importance of colour in marketing and sales away from the fashion sector.

Competition within the market featured strongly in the drive to develop accurate forecasts. Undoubtedly this was driven by celebrity trends and the need to develop fast fashion and follow the consumer's ever demanding obsession with newness. In assessing the longevity of colours, four principal components emerged, comprising:

- trend monitoring
- personal preference
- signature or core colours
- historical data or background to colour progression

These factors would easily drive the developments in fresh colour palettes. By monitoring trends in colour, gradual changes may be introduced when developing new colour palettes, based on the previous season's information, as seen in Fig 8.10. Seasonal Changes to Colour Trends. Personal preferences are often cited by colourists, such as blue being the favourite colour of choice with males and females of all ages, with yellow and orange the least preferred (Crozier, 1999), but in this context it could also incorporate the elements of intuitive design which the interviewees referred to, and their own personal colour preferences could influence their colour choices subconsciously as in Raymond's (2010) suggestion of gut intuition. Signature or core colours are also key to the longevity of colours with the classics, white, black, navy and camel, reoccurring every season, whether it is summer or winter. Finally historical information associated with a particular popular product or era might inspire a nostalgic revival for a particular colour range or indeed the forecasters may simply think it is time to reintroduce a particular hue, as it has not been used for some time. This may be linked to Brannon's model of cyclical colour trends, which illustrates the reintroduction of purple on a cyclical basis. In developing and monitoring

accurate forecasts, three areas emerged from the interviews which appeared most significant when reflecting upon previous seasons;

- sales (EPOS) data
- problem colours
- benchmarking

Sales data does appear to feed into the development of future colours for many who have access to it within a retail group, however, access to the data outside the organisation is limited. Birtwistle et al (2003) found retailers unwilling to share EPOS information with their supply chain regarding consumer purchases suggesting there was a 'high level of distrust between supply chain members' which would prevent information being shared and replenishment stock being delivered to stores more rapidly. This will be discussed further in Chapter 7, An Investigation in to the use of colour forecasting within two UK retailers, in Section 7.9.5, The Role of Electronic Point Of Sale (EPOS).

Internal use of the data ranges from simply offering the same colours each year, similar to the use of core colours, to comparing the rate of accuracy against sales. In one case, Earlier indications from several sources suggested an accuracy rate of around 80%. The figure has been accepted for the purposes of the research as a viable figure, despite a lack of clear data to support it, based on its acceptance from industry. The Mix based their accuracy on benchmarking with trade shows and sometimes with other forecasters. Indeed, they were one of the few to reflect on the commercial accuracy and success of their forecasted palettes, with no other forecaster doing so. This is an important aspect to bear in mind when considering the accuracy of predicted colours, and one which other forecasters could adopt to reassure their clients that they are indeed the experts when it comes to predicting colour.

Many trend prediction organisations look at their own forecasted colours to track the micro and macro colour trends over the seasons, but actively ignore what other forecasters are predicting. This may be due to the timescales involved, with most producing their trend books at approximately the same period in time, or perhaps because they do not wish to be compared or judged against others, fearful of being out of step with the mainstream? Whatever the reason, the interviews revealed few look at each other's predictions. However, in the longitudinal study, Retailer A compiled composite trend boards from all the major forecaster's publications to develop a number of generic colour palettes which were subsequently presented to their buying and design teams.

The most significant drivers in future colour predictions and developments were seen as being technical advances in fibres, or dyeing techniques. Many cited this as being responsible for allowing the introduction of new finishes, altering the appearance of hues and enabling the evolution of new tonal qualities within existing hues.

The expansion of the internet, linked to the development of online forecasters providing very immediate information to industry was also cited as an important future industry driver, and thus important to the development of future colour forecasts. Online predicted colours can be changed very rapidly, a colour updating service, such as provided by Peclers and Promostyl could be supplied far faster virtually than a published hard copy. Market forces seemed to have a smaller role to play proportionally than other factors, and thus appear to influence future directions the least of all. These factors will be compared with the results from the following section on colour committees.

6.9 *Consensual Colour Trend Committees*

Consensual colour trend committees are used extensively in the industry, as discussed previously. The fabric and trend trade fair, Premiere Vision, hold 'concertation tables' where representatives from all areas of the clothing industry meet the trend companies to:

'Create a consensual agreement amongst all relevant actors of what will become the common trends.'

Rinallo & Golfetto (2006:863)

Two contrasting meetings were documented; one where the author was a participant on the colour development panel, for The Mix Spring/Summer 2008 trend book. This took place in early April 2006 in London and comprised a variety of colour experts from around the world, although predominantly European based. The other meeting was of the British Textile Colour Group meeting in London, November 2008, where the author was an observer, and at which colours for Winter 2010 were being discussed. Many of the most influential colour experts in the UK were members and attended the twice yearly meetings to develop their own concepts for British colour trends, which were subsequently presented to Intercolour. The Intercolour Committee currently consists of 13 European and Asian member countries. (China, Finland, France, Great Britain, Germany, Hungary, Italy, Japan, Korea, Portugal, Switzerland, Thailand, Turkey) and is a non-profit organization, financed by annual member fees, of which the BTCG is a member. The committee does publish colour trends which are provided to all members after the two day meeting to create the international colour consensus, the Intercolour Colour Card as their website explains:

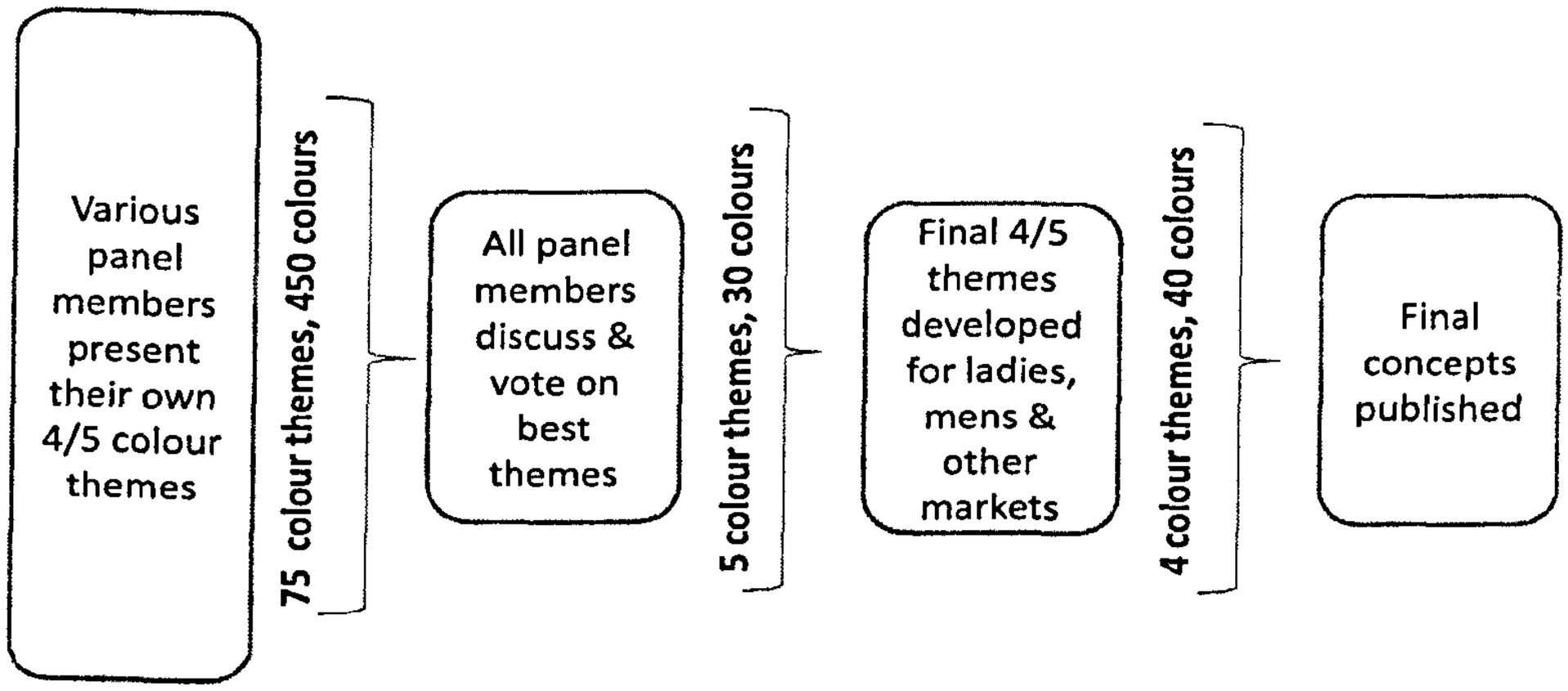
'Each member takes home the colours in original with explanatory text and all members colour concepts in short form. 24 months ahead of the season in question we are provided with an international view on colour which works as a source of further development and helps make decisions for different industry fields.'

6.9.1 Meeting Format

The meetings were organised in a very similar manner: experts, or BTCG members, were invited to the meeting on a specified date, twice a year to develop colours for two years in advance of the season. Each 'expert' or member worked in the fashion, textiles or apparel industries, usually, but not exclusively, developing colour trends. They were sourced by The Mix for their diverse range of product knowledge and expertise, and for their location worldwide, with experts coming from the UK, across Europe, the USA and China. By contrast, members of the BTCG had to be nominated by fellow members for their expertise and contribution to colour trend development. Subsequently, the existing members would vote on whether or not to allow the nominee membership, and not all those nominated subsequently were accepted into the group. All were UK based experts, as the name suggests, and included individuals from the established major trend forecasters, to independent consultants, and those working in associated industries such as leather goods. Several of the panel members at each meeting had been interviewed for the research previously, and so had previously been identified as being experts in their field, providing a good contribution to the research. At each meeting the following similarities were recorded:

- Each expert had 10 – 15 minutes to present their colour concepts.
- Four or five colour boards were presented by each expert.
- Accompanying text was also provided by some to explain the concepts.
- Inspiration was often sourced from fashion collections, artists and exhibitions, or socio-cultural issues.
- Several key colour stories emerged at each event.
- Colour boards were grouped together following all presentations, and the results analysed.
- Smaller groups developed specific colour stories which were subsequently agreed upon by all present, and would then go forward for either publication or further dissemination at Intercolour.

The bullet points can be summarised by Fig. 6.9 below.



Colour refinement process using expert panels

Figure 6-9 Color refinement process using expert panels

Colours and ideas are synthesised and refined in to the final concepts through a series of processes designed to focus in further on the major, recurring trends and colours, and identify suitable themes into which they can be grouped. This worked rather like a funnel, refining numerous colour and trend ideas, perhaps up to 75 themes and 450 colours or more, into a condensed version comprising four themes with approximately ten colours each, and is similar to Brannon's Trend development model, Fig. 6.1., which is essentially a funnelling of ideas into a workable trend concept.

In the case of The Mix, the colours were worked into groups of core colours for the main colour palette, with additional colours representing women's or menswear, or even sportswear or cruise collections depending on the season under development. In general the Mens colours tended to be rather more subdued than women's, and sportswear colours featured a larger proportion of brights or monochromatic schemes.

Inspirational travel was discussed at both meetings, and informed the colour decision making process of many contributors. This concurs with the information provided by the longitudinal surveys, and supported by the major forecasters. In a July 2006 Newsletter, French forecasting organization, Nelly Rodi, featured stories and images from trips which some of its staff made to Tokyo and Istanbul, from which they described their experiences, trends and key products they witnessed, and which were then used to inform the colour development process.

6.9.2 The British Textile Colour Group

The meeting took place in London on 7th November 2008 and a large proportion of the membership attended, sixteen in total, which is not always possible. Some members who could not make the meeting sent their colours and information sheets to other panel members for presentation; on occasion the chair also presented absent members colour

concepts. The group were developing colour palettes for the Autumn/Winter 2010/11 season and began with a meeting where all members presented their colour ideas. These generally took the form of trend boards, colour photocopies and accompanying text outlining the themes presented. The membership was diverse with representatives covering fabric, clothing, footwear and leather goods and the automotive industry, including representatives from trend forecasters such as Peclers. Major retailers such as Marks and Spencer and Liberty had members who were also present, design decision makers within the organisation. There were also contributors to the online trend service WGSN. Each member had ten to fifteen minutes each to present their ideas, and with sixteen members present, it took much of the day.

Figure 6-10: Denise Ford presenting Autumn/Winter 2010/11 colour trends, BTCG

Figure 6-11: BTCG members discussing and reviewing colour palettes

Each member presented a minimum of four trend boards illustrating their personal concepts for the season under discussion, usually featuring a group of images and an accompanying colour palette on each; some presenters, including Marks & Spencer's William Crighton, presented as many as eight boards.

Influential factors varied but many focused on the global economic crisis, rustic or natural colours and more traditional combinations, and the presenters spoke of their 'feeling' for a season, suggesting that their intuition may have played a part in developing heir initial concepts, as found during the interviews of forecasters, designers and retailers.

Liberty presented colours taken from an inspirational trip to Japan. There was also repeated mention of the 2012 Olympics due to be held in London, inspiration from designers such as Boudicca, John Galliano, and Hermes, and further references to societal and cultural factors. These included references to governmental statistics on obesity in the UK, China's 1 billion city urbanites and a focus on sustainability. Culturally artists such as Mark Rothko, Micah Ganske, Alexander Calder, Jeff Koons and photographer Zhou Mi were referenced.

The influences were diverse and reflected perhaps the personal signatures and colour preferences of the companies which some of the presenters worked for, or the individual influences experienced by some of the studios and freelance colourists on the panel, supporting Brannon's model in Fig. 6.1 by means of cultural indicators and the consumer scan.

It was noticeable that all those present submitted their colour information in basically the same format, on boards which ranged from A4 to A2 size, with images, limited text, fabric and yarn swatches or colour chips. In this respect members standardised their information, as can be seen in Figure 6.12: Trend boards grouped by colour stories at BTCG. This could be due to their experience at such events, and an unspoken norm which they conformed to, or simply an industry standard, as most colour forecasting books are designed in a similar manner, as discussed earlier in Chapter 4.

Figure 6-12: Trend boards grouped by colour stories at BTCG

The inspirational colour thread which ran through the presentations seemed to be nature, natural colours and natural forms. Several mentioned monochromatic colour palettes; some also identified a brighter palette, such as Janet Holbrook from. Keith Robson, who represented his own freelance design studio, summarised the season in his accompanying statement:

'Taken as a whole this Autumn's colour palette can be fairly easily grouped into lilacs and blues – browns and oranges – creams and golds – neutral greens and neutral greys which makes the whole look very simple and semi-tonal.'

(Robson, 2008)

Following the presentations, trend boards were segregated into groups comprising similar colours, which took quite some time and discussion. There were obvious synergies but some palettes which stood out as being very different. The panel then reviewed the groups of colour palettes and were given five stickers each to place on the five colour

boards and colour stories they thought most influential. The boards with the most stickers were shortlisted and again reviewed with comments by the members. This was a basic method of democratic selection, but one which surprisingly worked very well, and is used around the world to develop a colour consensus as Guerin explains.

'CAUS (Colour Association of the United States) is a membership based organisation. As such, its forecasts are determined by design and fashion and textile industry professionals in a time proven process of color consensus.'

(Guerin, 2005:51)

The similarity between the colour palettes was quite marked, given the wide range of diverse influences stated, and the group tended to select broadly the five colour groups which had dominated the days discussions, namely subdued colours, especially greens and blues, natural and wood tones, monochromatics, lilacs and a bright palette with a pink finish.

Figure 6-13: Two of the selected colour stories, monochromatic & subdued brights

Figure 6.13 illustrates the small orange stickers members placed on the boards for the purposes of selection, and some of the more popular boards eventually chosen by the BTCG panel. It was also interesting to note from the images, the different manner in which colour was represented by the various members, some preferring swatches of fabrics and yarns, which perhaps did not always truly represent flat colour, and some using paper swatches for their colour presentations.

The following day two of the members would return and work on the boards, pulling out key colours and placing them into five major colour stories. Late afternoon of day two, the remaining members would return to review the colour stories and approve them. They would also collect their colour boards, and the colour stories developed by the BTCG representatives would be sent on to the international colour body, Intercolour. There the presentations would be from all Intercolour representatives around the world, but be conducted in broadly the same format as the BTCG meeting.

The members would all be provided ultimately with the Intercolour 'consensus' colour palettes, which could be quite substantially different to the original colours suggested by the British group, but developed in the same fashion, the distillation of the member countries colour concepts.

6.9.3 The Mix, Global Colour Research

Global Colour Research are publishers of fashion and interior colour forecasting books The Mix, and were based in London, UK. The organisation was established in 2000, and its publisher had over 30 years experience in the colour trend forecasting industry. According to their press release in March 2004 they are 'a unique colour forecasting service providing intelligent colour solutions across all produce sectors for the fashion and interiors industry.'

The Mix was published twice a year in spring and autumn, but the process began much earlier when experts from around the world gathered at the London offices to discuss their ideas for the coming season's colours. Usually this was over two years in advance of the season, in February for the Spring/Summer publication two years hence, and September for Autumn/Winter.

Approximately ten colour professionals discussed their colour concepts and inspiration for the season. Usually each expert presented four or five different colour trend themes supported by relevant imagery, colour swatches, texture, pattern and styling; presentations were introduced by the creative director of the Mix, Rob Merrett, who also led the meetings. In early spring 2004 the meeting took place to develop The Mix colours for Autumn/Winter 2005/6 feature colours for women's and menswear, key and accent colours, sportswear and resort collections.

Figure 6-14: Trend boards grouped by colour at The Mix

As in the BTCG meeting, members presented boards which featured mainly pictures, some text, and colour swatches in the form of paper, fabrics or yarns. The full range of such materials adopted to represent colour is evident from Figure 6.14: Trend boards grouped by colour at The Mix. Swatches of yarn, thread, fabrics, ribbon, paper, and even colours lifted directly from the Pantone colour reference books were utilised. Some members brought glass, ceramic or stone chips to represent colours and spoke of their instinct or feeling for the season, as at the BTCG meeting. There were naturally many different colour stories presented; each season The Mix fashion publication featured just four colour stories, so there was pressure to restrict the panel to selecting the strongest four themes presented.

Figure 6-15: Soft greyed shades presented at The Mix meeting

Following the initial presentation, the panel discussed the strongest colours and themes developing from the concept boards. Often there were at least two overriding emergent themes, perhaps centering on a particular colour or group of colours. The panel subdivided into groups to develop four themes as the final colour propositions for The

Mix. As can be seen from Figures 6.14 and 6.15 there were numerous very different colour concepts presented at the meeting, from a greyed soft story, to reds and black graphical concepts, and brights with darks and inspiration from cosmetics and pharmaceuticals to traditional Britishness. .

Figure 6-16: Colour development boards from greyed shades at The Mix

Each colour proposition featured a group of nine core colours that reflected the mood of the concept. From that initial core, men's and women's palettes began to be developed; each featured at least five colours from the core palette with complementary colour reflecting the basic theme of the colour group. Usually there were seventy colours or more developed at the meeting across the four colour trend propositions. Figures 6.16 and 6.17 illustrate how the colour selection progresses from the initial grey themed concept boards developed. The middle section shows the core colours, and the right hand side mens colours, with women's on the left side. It can be noted that the women's features warmer, softer, arguably more feminine shades of lilac and dusky rose, whilst the Mens colours are what could be described as masculine, harder edged dark greys. It was during this process of expanding the palettes that perhaps the evidence of expert intuition at work was most apparent. The panel members had expert knowledge of what colours worked well together, and what colour palette combinations had been successful previously. They used their knowledge with their expert intuition to develop a broad range of complementary colour palettes with a particular group of colours, and this was a key outcome of the observational process.

Figure 6-17: Final colour boards for Autumn/Winter 2005/06

The final version of the colours developed was published in the Autumn/Winter 2005/06 book and can be seen as having broad similarities with the colours developed at the meeting, with the addition of a very vibrant light pink. In contrast Figure 6.18 from the same season shows the selection of a far brighter range of colours from a different colour story theme, which was brighter, and more luminous.

Figure 6-18: Core colours, men's and womenswear colours at The Mix

Finally, some colour trends proved so strong that further areas were developed from the core colours, perhaps sportswear, cruise collections or yoga inspired colours. After the colour selection and development were completed, the colour panel began to discuss the overall concepts and themes in more detail, suggesting titles for the colour groups, developing storylines and styling ideas with the aid of a copywriter and the creative director. The inspirational colour palettes and the initial presentations helped to supplement the panel's initial thoughts, and consensus was achieved with clearly defined directions for the photography, fabric development and artwork to commence.

Photography was specially commissioned and styled by the in-house team, according to the guidelines set by the panel during the meeting. Many trend forecast publications use 'found' or second-hand imagery, rather than creating their own unique images for each publication. In this, The Mix was relatively unique, although companies such as Peclers subsequently started to create their own imagery, interspersing it with found images.

Fabric concepts were translated into products by custom dyeing, printing, embroidery and appliqué; again, this resulted in unique products to illustrate the publication, and the colour concepts.

Figure 6-19: The Mix trend books

Initially, The Mix featured colours with a variety of textured finishes, from leather, velvet, woods, metallics and wovens. In more recent publications the practice ceased, and colour was simply shown as a flat, matt or gloss. The book was supplemented by pull out colour charts and fans, for easy transportation, and a particular feature of the books was the colour proportions section, which provided guidelines on how to mix the colours together, recommending a balance for the various colour themes. Each colour was Pantone, NCS and RAL referenced, and from Spring/Summer 2006, The Fashion Mix books featured colour stories on fabric swatches dyed by Engineered Colour Standards TM from Archroma, one of the world's largest speciality chemical companies. This allowed customers to purchase additional colour swatches from Archroma, and in addition, the new colours will be added to the range of dyes manufactured by Archroma, allowing manufacturers to achieve the correct colours selected from the books.

Supplementing the publications was the bespoke service provided by GCR. Customers worked with the organisation's creative director and publisher on specific colour and

design issues, and recent clients included Dulux ICI paints, for which a new colour chart and catalogue were created.

6.9.4 International Trade Fair Committees

Additionally, influential fabric and yarn trade fairs have developed their own colour committees (often comprising representatives from the major forecasters and international colour committees) to predict advance colour trends unveiled at the trade shows. In some cases the information appears to duplicate some of the forecaster's information, inevitable given the composition of the panels. However, trade fair committees modify the trends for specific market sectors such as yarn or fabric. Perhaps the most influential of these shows, acknowledged by Brannon (2000), Goworek (2001) and Jackson (2001) is the Paris based bi-annual fabric show, Premiere Vision.

Figure 6-20: Paris Trade Fair Premiere Vision

Premiere Vision is held in September and February in Paris and introduces the latest fabrics primarily from the European Mills. It is well known for its display of influential colour trends, compiled by a panel of International colour experts and available to all visitors at the exhibition in the large colour forum. Smaller, colour books are available to purchase too, and are basically a range of colour swatches grouped into key themes or stories, featuring some information about the colour groups and their origins.

Events on the global fabric trade fair calendar, such as Interstoff Asia and The Elite Fabric Show, also used the services of GCR, featuring their colour concepts, uniquely developed for the trade shows, in a special display area. This was by no means unusual, as many trend organisations are represented on colour panels for leading international and directional trade fairs.

Figure 6-21: Trade fair colour concepts from The Mix

As seen in Fig 6.21, the trend areas within the major trade fairs are designed to allow delegates maximum exposure to key colours and themes.

6.9.5 Summary of Common Practices

The synergies in colour development processes identified by observing meetings of the British Colour Textile Group (BTCG), and Global Colour Research, publishers of The Mix colour forecasting books were striking. Each meeting appeared to follow a similar format, resulting in a consensus of colour opinion. Independent colour experts and those representing larger consortia or studios were present at each meeting and brought their own personal colour trend concepts, interestingly compiled from many of the same sources cited by the retailers in the longitudinal surveys, but quite diverse in specific subject range. These were supplemented by their industry knowledge, experience and expert intuition. The main information sources appeared to be socio-cultural factors, designer catwalk trends, inspirational shopping trips, media and lifestyle trend, encompassing many of the principles and the model proposed by Sproles (1979) and Brannon (2000), but interestingly no direct research contact with consumers, which appears to be less important to contemporary forecasters than it was in Sproles' day. However, with the rise of lobbying through consumer blogs, this may be on the increase as Raymond (2011) believes. Knowledge and the ability to concisely identify and formulate trends is not always a skill easily developed, as Franck (2000) and Raymond (2010) acknowledge, although there are skills which can be learned.

Forecasters who specialize in technical aspects of the business like colours and fabrics also rely on extensive knowledge of the industry and common sense. Pat Tunsky, whose expertise is colour, credited her 26 years in advertising, retail and forecasting with bolstering her ability to look into the future. To forecast the comeback of jean jackets, for instance, she took note of young women in Europe wearing denim jackets juxtaposed with work clothes for the office, and noticed also that cutting-edge designers like Helmut Lang showed denim on their catwalks (Franck 2000). As indicated in Fig 6.7, part of Tunsky's success can be attributed to experience and the ability to link that experience with influential factors such as catwalks and lifestyle or societal trends, synthesising the information and either consciously or subconsciously referencing previous colour trends and palettes which had been commercially successful. Would such a conclusion preclude younger, less experienced forecasters from achieving accurate and commercial colour forecasts? Not necessarily, in particular, as the observations at the colour development meetings suggested, when groups of experts meet to discuss their ideas and form new colour palettes, there is a consensual approach adopted. This was much the same within the longitudinal surveys, where numerous players within the organisation would make decisions by committee in many cases. The younger, less experienced forecasters would learn from their more experienced counterparts and develop their personal knowledge further at each event to enable them to apply such experiential learning to future trend development situations.

6.10 Summary

In answer to the research questions posed at the beginning of the chapter, it is evident that there are several key information sources used by the majority of forecasters and those developing colour in the industry. Each may be used in slightly different ways, or with more importance ascribed to it, but evidence indicates basic sources remain as catwalk trends, socio-economic trends, lifestyle and technological innovations, cultural events including major exhibitions, theatre productions, music or film, whilst retaining a sense of what colours have been used in recent seasons. It was established that forecasting industry advocates an accuracy rate of 80%, whilst overall sell through rates are at around 80%, incorporating discounts. Sell through rates without discounting stand between 30-40%, with the exceptions being basic products in core colours, which can achieve a 95% sell through without discounting. Figures suggest that by improving the accuracy of trends, and using more core colours, higher sell through at full price may be possible. Developing product, and colour, closer to the season using fast fashion principles may help this accuracy rate improve further.

Comparing methods of developing colour from consensus between the BTCG and The Mix commercial colour forecasters would indicate strong correlations between the approaches used. Each canvassed the opinion of a relatively large group of 'colour

experts', professionals who regularly worked with fashion colours within the clothing and textile industries. A minimum of twelve experts were used by the respective groups, and each presented their individual colour trend ideas for the season two years in advance. The key difference at this stage was the nationality of the experts, and their country of residence. Whilst the BTCG used only UK consultants at the meeting, The Mix sourced experts from around the globe; the reasoning behind these differences is quite simple. BTCG are reflecting a truly British colour taste, a non-commercially oriented palette which they did not need to recoup any finances from, being a charitable members only organisation. Conversely, The Mix published a commercial colour trend forecasting book, and as such needed to reflect a commercial view from around the world, whilst retaining some of its British handwriting which would ultimately make it appealing to a broader range of international clients.

The Intercolour meeting followed the same format as the BTCG meeting, finally realising a truly international colour consensus, however it did require further iterations of the process both at the final Intercolour panel meeting, and at the other member countries to achieve. From the research gathered, it appeared the consensual development of colour is a common one used by colour forecasters around the world. The distillation of ideas and colours as seen in Fig. 6.9 is standard practice and is a further chain in the synthesis of inspiration and concepts from the individual trend experts.

Inspiration for the colour palettes covered a range of topics, fashion trends were important, as were recent or forthcoming exhibitions of art, photography or fashion. Many societal influences were cited, changing lifestyles, new technology, sustainability and environmental issues, plus pivotal world events, more recently the economic downturn. Each expert invoked a slightly different nuance for their proposed colour palettes, but invariably many similar colours appeared in the wide variety of colour stories presented, however the expert had gathered their influences and distilled them into tangible colours. This was particularly noticeable at The Mix, where the experts came from around the world, throughout Europe, the US, and China. They appeared to employ most of Brannon and Sproles's principles, as outlined previously, although obviously utilizing some new methods such as sources of information from the internet, and some research based information, as suggested by Raymond (2001).

Some colours presented at The Mix could arguably be described as having evolved from the previous season's palettes, potentially allowing the individuals concerned to build on previous colours. However plausible, The Mix often changed its expert panel from season to season, making it impossible for new panel members to fully comprehend the seasonal colour evolution, unless they were familiar with their publications.

The obvious answer would be to conclude there is a generic distillation of ideas from key themes worldwide, such as the environment, which might suggest earthy, natural hues, or

from sustainability, which could be interpreted as make do and mend, invoking a vintage feel for faded brights; or even a theme of economic prudence, leading to a variety of sombre, more monochromatic colours.

As mentioned previously by the experts who took part in the interviews, intuition was cited as a major factor in how they develop their colour trends, but this can also be influenced by experiential learning and individual colourists may have different levels of experience to bring to the meeting. Internationally renowned colour expert Li Edelkoort collects colour year long, objects such as fabrics, yarns, papers or stones, then when she is about to compile her colour trends for the season, she selects from the pool of colours in an intuitive manner, without a methodology (Diane & Cassidy, 2005). Edelkoorts' decades of experience in the colour forecasting industry would allow her to draw on her experiences and commercial successes, using her own knowledge of how colours work together to develop palettes which are valued so highly within the industry. Such an approach is favoured by some forecasters, one which combines intuition with colour knowledge of previous seasons and of markets. This appears to be the clearest indication of how individuals develop colour palettes; a fusion of the highly developed expert intuition of a forecaster, combined with their knowledge of historically successful colour combinations, and a continuous research based approach to determining the socio-cultural, technological and environmental trends.

In a committee setting, a collective agreement on the most successful or appropriate colour palettes can be made by a broader group of forecasters, but the initial, personal opinions and thoughts of the forecaster compiling a colour palette will still be relevant through the colour palettes they concieved. The amount of intuition that a forecaster has used in developing a palette will naturally vary from person to person, as will the different sources of inspiration. Perhaps there is no logical explanation of how the process evolves on an individual basis as so much is subjective, and indeed objective as Barnett (2011) reported.

The research findings suggest that intuition and experience play a vital role in the development of trends. Clearly when a democratic process of selection is employed, as in the two colour committees, there has to be a consensus amongst the experts which subsequently draws on their knowledge and experience, as much as their intuition and research, to filter the wide range of diverse colours and themes presented down into a more manageable set of commercial colour palettes. It is at this point that the forecasters have to defer to a more democratic selection process, and agree with the majority on the colour palette choice, even if their colour concepts are not in keeping with the final selection. At the two meetings it was observed that some less experienced or newer members were usually happy to defer to the more experienced members in terms of final colour selection, with the group leaders tending to have more experience in colour palette

development. However, the range of palettes developed, usually four or five, and the additional colours provided by The Mix for mens, womens or sports wear, allowed for such a wide range of colour groups to be developed, that most colour concepts could be incorporated in some way into the final palettes.

This will be explored again in Chapter 8, section 8.3.5, Reviewing cyclical colour combinations, comparing similar colour palettes from different forecasters and different eras, and could provide some answers as to how colour forecasts specifically could be made more accurate in the future, although the evidence that predicted trends are 80% accurate suggests the forecasters have perhaps been able to either convince their clients their predictions are accurate, and therefore reach a critical mass of adoption in any given season to ensure they are seen to be successful, or that they are working to an established formula based on historical and commercially successful colour combinations.

7 An Investigation into the Use of Colour Forecasting within Two UK Retailers

'It's all about timing. You follow the trendsetters. You see what they are doing. If your trend is the right trend, it's going to hit those mainstream people at the right time.'

(Gladwell, 2000, 211)

7.1 Introduction

Since the developmental methods of forecasters and their proposed accuracy rate has been established against sales of merchandise, this chapter focuses on the fashion and textiles industry use of colour forecasting information, how it is applied and changed as a result. It uses primary research in the form of two longitudinal surveys with two major UK clothing retailers, one from the high street and one a supermarket. Throughout the longitudinal surveys the two key research questions referred to were:

- Where does colour forecasting fit within the supply chain?
- Where does colour forecasting fit within the retailers' critical path?

Although these questions might appear similar at first sight, closer inspection and understanding of the trend forecasting and fashion retail businesses will reveal that the two areas are in fact very different with differing time scales and imperatives. The critical path is something which the retailer generates. It encompasses the various phases of product development, range planning, product sign offs, sales forecasts, weeks of sales and phases, and incorporates aspects of the supply chain in the raw material and garment manufacturers time scales, essentially so 'the right thing happens at the right time.' (Le Pechoux et al, 2002). The supply chain views flows of goods from the raw material suppliers, the manufacturers, distribution and finally to the consumer in store (Hines, 2002). The chapter will also attempt to assess how and why the retailers colour teams reach their final decisions in creating colour palettes, contributing to other research questions, some aspects of which have already been addressed by earlier chapters.

- What are the key information sources?
- Are information sources duplicated by forecasters, designers and colourists producing homogenous trends?
- How are colour palettes developed?

Finally, the retailers perspective will provide evidence to help answer:

- Can colour forecasting be accurate if compiled over 2 years in advance?

- What happens if information is inaccurate?

The chapter is important in that it examines a number of the main research questions, and contributes evidence to all the research objectives.

7.2 *The UK Apparel Market*

Substantial value has been added to the UK clothing market since the mid 1970's: by 2000, over a 26 year period, UK consumer spending on clothing had increased almost threefold with most of the increase accounted for by inflation (Hines, 2001). However, there was a substantial increase in demand between 1990 and 1998 due to the large amount of imports coming into the UK. At that time apparent consumption increased by 10.9% (Hines, 2001), and by 2001 sales of apparel had risen by 12%. These figures reflect an increasing demand for apparel, but conceal the true nature of the business, one that has seen the value in real terms of clothing drop significantly throughout the highlighted period. Value or discount retailers have performed well, with brands such as Primark and Matalan providing strong competition for the middle market. Some see the situation changing in the short term, with value led retailers such as Primark increasing their sales volumes but losing their like-for-like value growth as consumers buy less but buy better, more expensive brands (Mintel, 2008). In the 12 months from March 2007 to 2008, Primark's market volume share was estimated at 10.1%. This compares with Marks and Spencer's market volume share during the same period of 8.7%, Tesco at 9.3% and George at Asda at 11.4% (Hall & Santi, 2008). Consumer's are apt to view clothing at such a price as disposable; when a t-shirt can be purchased for less than a cup of coffee, it is arguably justified to wear it once and dispose of it. The astute consumer has become aware of the increasing number of options available to them in the value sector and becoming keenly price conscious.

'Growth in the value market highlights the determination of consumers not to pay over the odds. At every level there is evidence of bargain hunting...'

(Priest, 2005:255)

Consumers are also looking to other, non-traditional sources to purchase items at discount prices.

'Today's customer is a cross-shopper who frequents not only traditional Department Stores, but also many other retail venues, including discount stores, outlets and the Internet.'

(Guerin, 2005:163)

Consequently there is considerable competition on the UK high street in apparel sales; the market for apparel and textiles combined was valued at $46.6 billion (approx £23.5billion) in 2003, with annual growth of 2.8% between 1999 – 2003. The apparel

sector accounted for over 75% of the market value in 2003, worth $38.5 billion (approx. £20 billion). (Datamonitor, 2004). The market experienced steady growth with womenswear apparel sales alone worth £21.2 billion by 2008, up 26% in real terms on 2003 (Mintel, 2008). Slower growth was predicted from 2008 onward due to the global economic downturn experienced throughout 2008. An anonymous trading director for a department store was quoted in Mintel's UK Womenswear Retailing report in July 2008:

'Generally it will not be an easy ride over the next 12 months. So the retailers have to ensure their product is on trend, good quality and increasingly trans-seasonal because the weather is so strange and volatile. '

Mintel (2008:4)

Challenging trading conditions are nothing new in the retail sector, and indeed aided the development of the trend forecasting business from the 1920's.The experts have informed the design and buying decisions of retailers since that time, but still do not always manage to generate the appropriate concepts necessary for sales growth or successful product lines. Concurrently, inability to spot the correct trends, or use the information appropriately may also cause problems and result in poor retail performances. In 2002 inappropriate or dull designs were blamed at UK retailers Marks & Spencer and Laura Ashley for lack of sales, and at the William Baird Group's brands Windsmoor, Planet and Precis Petite. In the Baird example, inability to spot and translate current trends was cited for poor sales figures (Sinha, 2002). Providing accurate and timely forecasts or developing more accurate palettes in house would ensure appropriate trend led, desirable merchandise is developed to entice customers to purchase more and drive sales revenues.

7.3 Supermarket Superfashion in the UK

The UK high street is a unique blend of high and mass market fashion; in recent years it has also become increasingly price sensitive due to competition away from the traditional high street. In apparel terms, it is not only the high street where retailers now compete to gain market share; British supermarkets have spearheaded the leap into clothing retailing, offering value and fast fashion. The pioneer of fashion led clothing retailing within the supermarkets was George Davies. George launched the radical retail concept 'Next' in the UK after menswear retailer Hepworth's brought him in to overhaul its stores in the late 1970's. He explained his vision for 'Next' was simple in an interview with the author in 2006.

'Colour block the merchandise, so the customer could effectively select their own colour coordinated outfit without too much trouble, therefore ensuring considerably larger sales volumes, and customer satisfaction.'

(Davies, 2006)

Previously in the UK, the majority of stores had adopted a scattergun approach to colour coordination and product placement. By making the merchandise coherent, customers were able to find products easily that fitted their style and price level. In the 1980's 'Next' established itself as one of the UK's leading retailers, diversifying into interiors, cosmetics, mail order and even gardens for a brief time. George Davies was awarded the Guardian's Young Businessman of the Year in 1985 as a result of his concept for 'Next'.

In 1990 his extraordinary vision once again launched another innovative clothing retail concept, 'George at Asda', a fashion led clothing brand within the Asda supermarket stores. It is now commonplace to find fashion led clothing on sale at a supermarket, but in 1990 it was revolutionary. Davies could see there was a new way of shopping waiting to happen. He targeted mainly women with children, who were the largest group of supermarket shoppers. They did not want to compromise on garment quality or style, and the 'George at Asda' label provided a convenient, fashionable brand amongst the groceries. Products had to change rapidly to match customer demand and the weekly shopping visit and sales grew steadily. Many other British and foreign supermarkets followed his lead, introducing clothing ranges into their stores, including Tesco and Sainsbury's in the UK. For ten years George was at the helm, but decided to resign from the company in 2000 after it was taken over by US retailer Wal-Mart. (Davies, 2006) The label continues to trade successfully today and has expanded; George is now sold in 353 stores worldwide and accounts for £2 billion in annual sales (Hall & Santi, 2008). The supermarkets now compete vigorously with the value and mass market end of the high street, offering affordable fashion in a convenient setting, and have effectively changed the landscape in UK apparel retailing.

7.4 The Impact of Fast Fashion on UK Retailers

Fast Fashion has undoubtedly impacted on the UK high street stores. The practice whose inception is widely credited to Spanish retailer Zara in the 1990's, focuses on shortening lead times, resulting in a large number of seasons, with some retailers buying on a weekly basis in order to introduce new product to tempt the consumer each week (Bruce & Daly, 2006). This has proved particularly important to the supermarkets, where it is clear that if they are to succeed, they need to have new merchandise available each week, as their customer typically visits at least once a week to do the weekly shop. In 1997 Watson observed that the entire product development cycle in the UK took on average 167 days, almost half the year. However, the time devoted to manufacturing the product was only 39 days. Watson found that the remainder of the time was spent in decision making, such as developing trends and planning ranges; this explains why trend books are published so early in the colour and fashion development cycles. The model of fast fashion has changed this somewhat, ensuring that newness is the top priority. Due to the changing pace of fashion retail, today's retailers face a trend turnaround at a rapid pace, with more

transitional fashion seasons than in previous decades. The traditional notion of an Autumn/Winter and Spring/Summer season has been outdated for some time, and the industry reacted by introducing a number of different points within the fashion year to highlight the changing mini-seasons. This has undoubtedly been enabled by quick response technology (Mintel, 2008, Burns & Bryant, 2002), much of which was developed in US in the mid-1980's. According to Birtwhilstle et al (2003), there are three main factors behind the introduction of quick response:

1. Reduce excess stock holding from raw materials to finished product.
2. Reduce risks by making purchasing decisions closer to consumer purchase.
3. Financial savings through increased efficiency.

Directly as a result of the implementation of quick response, purchasing decisions are now made much closer to the delivery dates and the concept of fast fashion was developed. Many design-led retailers, such as Zara, have become more high fashion focused, only committing 20% of their buying budget up to six months ahead of the season, allowing considerable design and production flexibility with the remaining 80%. Birtwhistle et al (2003) and Bruce & Daly (2006), concluded that Zara was able to satisfy consumer demands for fashion led pieces on an almost daily basis, a demand which is fuelled by the rise in online fashion resources, celebrity lifestyles, television coverage and consumer fashion magazines featuring the latest catwalk creations available to the consumer. Colour has become an important selling point in the fast fashion cycle, in particular on the UK High Street, in order to redress some of the fast fashion issues. Garments can be bought in bulk in greige format, and batch dyed to provide a wide spectrum of high fashion colours for basic pieces such as t-shirts. Fast Fashion and quick response has perhaps had the most profound impact on UK apparel retailing in recent years. In response, technology has had to keep pace with the demand for information in modern retail; Grant and Fernie (2008) cite the example of UK retailer House of Fraser who estimated 36% of lost sales from customers who could not find the right product in their size or colour when they visited their stores. Having more control of stock and operating a 'just in time' policy, where merchandise is effectively distributed to stores almost as soon as it is received in the distribution centres, has helped many retailers to control their stock. When this is coupled with better design, more coordinated product ranges and a more limited range of products in store, Easey's 2009 model of Edited Retailing is implemented, as in Fig. 7.1.

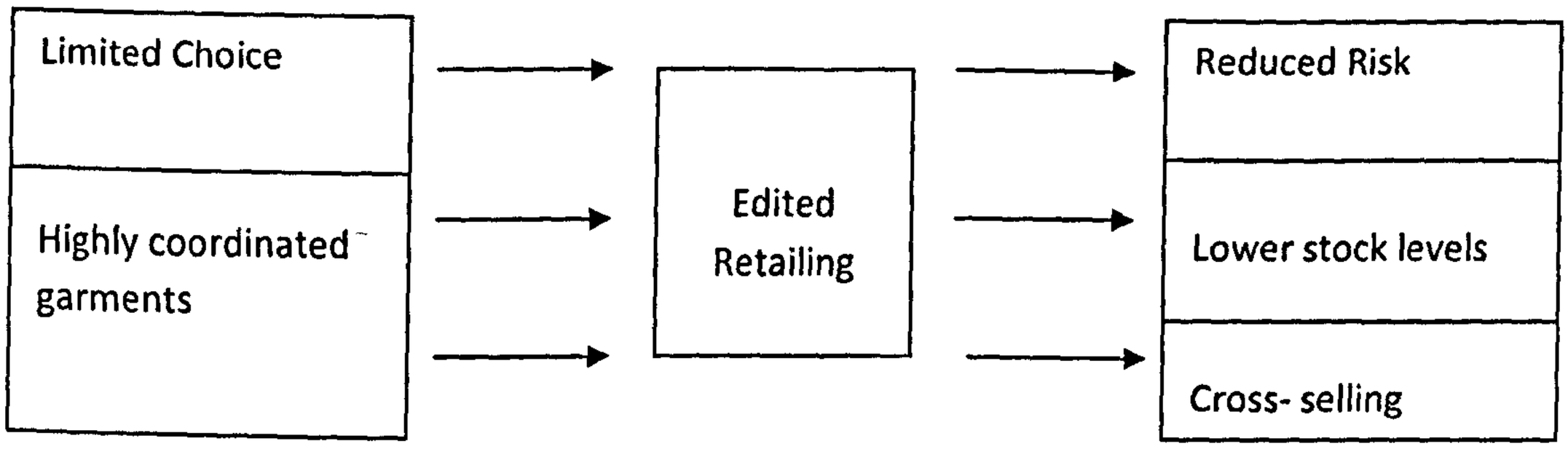


Figure 7-1: Edited Retailing Concept Easey (2009)

Easey further explains the concept, which has been adopted by retailers such as Next in the UK and facilitates the implementation of fast fashion.

'The customer is offered a limited though changing choice of merchandise that is highly co-ordinated, offering a high degree of product range compatibility.'

(Easey, 2009:202)

It was noted throughout the longitudinal surveys with two retailers which are outlined later in the chapter, that neither retailer operated the edited retailing concept. This could be due in part to the nature of their businesses, one a supermarket retailer, and the other a large scale retailer with numerous sub brands across its womens, mens and childrenswear offerings, and the very broad customer base both retailers targeted. Easey (2009) suggested The edited retailing concept is best used for higher fashion, clearly segmented customer groups with a more high fashion oriented demographic. Indeed, by 2010 Retailer A had abandoned its fast fashion concept, with the fast fashion department disbanded. The supermarket retailer did not believe it was the type of business which needed to provide fast fashion, and had decided to refocus on its core value business, whilst still having a strong fashion input. By implementing such a strategy, more effective sourcing and competitive pricing was achieved within the group, without any adverse impact on sales.

Not all agree that fast fashion is good for business, or specifically for the designer's creativity. Zowie Broach of British label Boudicca believes:

'Fast Fashion is nothing but a superficial cycle of rehashed ideas. True creatives forge a world of their own. A great designer's work is instantly recognisable – this is 'slow' fashion.'

(Britten, 2008:16)

At the designer level within which Boudicca work, they maybe able to develop their slow fashion style as Broach insists, however, the mass market does not have the luxury of time and cannot therefore operate in the same way at present. Consumers are the driving force behind mass market fashion consumption and communications are enabling far swifter transmission of ideas, either from the catwalk, duplicating celebrity looks, or even street style, to enable consumers to purchase the products they want, as quickly as they see

them in many cases. The fashion lifecycle, originally developed by Rogers (1985) was outlined by Sproles & Burns (1994:93) to illustrate how different groups of consumers accept specific new styles or trends.

1. Time taken to for a fashion trend to filter through the market; most take several years.
2. The rate at which consumers adopt the style as time passes – some are adopted faster than others and reach mass market saturation far earlier than other that may encounter strong resistance from the mass market.
3. The level of acceptance of the trend at each point in time. Some are never adopted by the mass market, and remain on the fringes.

Sproles & Burns correlated marketing stages with the fashion life-cycle expanding Rogers' initial theory; if the product is new it is typically marketed as high fashion at a premium price. As it gains in popularity, it is adopted by less fashionable stores and becomes available to the mass market. Eventually the trend reaches marketing obsolescence, where it is no longer desired or purchased by the consumer at any price. The transient nature of fashion ensures such occurrences are not occasional, but regular happenings, perhaps for good reason.

'Planned obsolescence powers the economic engine of fashion.'

(Brannon,2000:6)

It is unlikely therefore, that the mass market would be willing to adopt the Boudicca philosophy of slow fashion, but it does not result in every brand slavishly following the fast fashion approach, instead some are crafting pieces which as trans seasonal, sometimes referred to as timeless pieces. The classic white shirt, the pea coat, the leather jacket, basic vest and t-shirt, or good quality cashmere sweater; all these are arguably slow fashion pieces whose longevity is unquestionable in today's fast fashion retail environment. Many colours can arguably be viewed in the same manner; seasonal staples, white, navy, black or camel, fail to be transcended by fashionable colours which may come and go.

David Wolfe from US trend agency The Doneger Group, was asked in 2002 what clothes were worth keeping in terms of trend returning. His view reinforces the appeal of classic styles and colours.

'Classics keep coming around. A great white oxford shirt. A Chanel suit. Oversize sweaters.'

(Guerin, 2005:191)

The 'classics' phenomenon is obviously instrumental in retailers retaining core colours season after season, as Wolfe mentions, and consumers being happy to continually purchase them.

7.5 *Colour Development in the Critical Path*

In Chapter 5, section 5.5, An Evaluation of the Role of Colour Forecasting, the position of colour development in the critical path was very firmly placed at the beginning of the process, as highlighted by Fig. 5.3, Diane and Cassidy's 2005 model of where colour fits within the product development cycle. The longitudinal studies aimed to examine this further, to investigate whether or not there could be any variation to the model, and how it was used within the retailers critical path. This would naturally encompass what information sources were being used by the retailers to develop their colour palettes and whether or not they were duplicated by each retailer.

7.5.1 Longitudinal Studies

Two longitudinal surveys were carried out to establish the development of colour trends within two major UK retailers over a period of 27 months and 12 months respectively and to contextualise the influence of colour forecasting within the supply chain and critical path. Each retailer represented different market levels and was chosen specifically for their diverse markets; Retailer A was the UK's largest supermarket clothing retailer offering a wide range of value clothing in a variety of product areas, some fashion, some basic, or core products, and had stores worldwide with a strong base in the US. Retailer B was the largest clothing retailer in the UK, with a wide range of sub brands with various price points within the overarching brand. They too owned a number of overseas stores, although these had been scaled back in 2001 and were centralised in the Far East. In 2004 Retailer B was overtaken by Retailer A as Britain's largest apparel retailer, a position which Retailer B has since regained.

Each retailer was undergoing a period of change in response to market demand, and changes at the most senior management levels, but it was the very different customer base and price points which suggested to the author that a strong comparative analysis could be made between the two organisations. Retailer A was far more open in respect of the number of meetings, and staff availability for the longitudinal survey, allowing full access to all their creative colour developments and information throughout. Most meetings were held with more than one member of staff, and they were very happy for follow meetings to be arranged with those outside the colour team. Retailer B was rather more guarded, although a substantial amount of information was made available, the meetings were always with just one member of the colour team, but as a result were more difficult to arrange due to lack of availability. Overall, each retailer provided a wealth of

information, with Retailer A providing a more comprehensive insight into the overall organisation due to the number of staff involved with the survey.

The longitudinal surveys revealed exactly how colour trends were developed and used by a wide range of staff within the organisations at various levels. Critical paths were provided by both retailers, allowing examination of the key dates within their respective fashion calendars; access to their colour trend boards and colour development strategies proved highly insightful. Establishing exactly what criteria were used to select seasonal colours, sources of information and inspiration, the Importance of core colours, colour trends for different sectors of the business and for sub brands contributed substantially to the key research questions.

Using grounded theory to assist in the process of conceptualising the data gathered through the longitudinal surveys, it became easier to represent the true findings within the data. The approaches to colour selection, critical path management, interviews and other data sources informed the research process when attempting to identify synergies or divergent practices between the two companies. This assisted in the analysis of the two organisations approaches to colour forecasting, colour trend development, and in the development of the theory behind the practices. Goulding (2002) identified 6 basic principle of grounded theory from Glaser & Strauss's original 1968 guidelines which have been utilised.

1. enable prediction & explanation of behaviour
2. be useful in theoretical advances
3. be applicable in practice
4. provide a perspective on behaviour
5. guide & provide a style for research on particular areas of behaviour
6. Provide clear enough categories and hypotheses so crucial ones can be verified in present & future research.

Consequently, the information arising from the surveys was sorted from the transcripts of the meetings attended and conversations. Open coding was applied to the records of the meetings at both retailers to describe what was happening, and sort into groups which showed related themes as with the practitioner interviews in Chapter 6. Subsequently, this provided a methodology by which to identify the key areas of focus, important practices and concurrent approaches to the development of colour palettes each season. The limitations were obviously the varying durations of each survey, and the wide range of market segments surveyed with Retailer A, namely women's, means, children's and

lingerie, in comparison to the much more limited survey in Retailer B, where only menswear and boyswear was examined. Open coding allows the researcher to break down the data, in this case the interview and observational records, into clearly differentiated units of meaning, where the text is analysed line by line in order to identify key phrases or words. Initially, there are many unrelated codes, but through the process of clustering these into groups, patterns usually emerge which indicate something about the behaviour of those interviewed or observed. This then starts the system of abstraction, where codes are linked together to eventually create explanatory concepts (Glaser, 1992). Through this process, the analysis is lifted to a more abstract level which subsequently moves away from simple description and toward the development of theories. These will usually comprise several strong examples found within the data examined which contain common features, and which may then be developed further into a conceptually complex integrated theory. The development of the theories surrounding the development of colour palettes will be further examined in the following chapters, where numerous interviews with designers, trend forecasters, and other colour experts in the industry will be subject to the same methodology, and links found to further develop the concepts from the longitudinal surveys further.

7.5.2 Overview of Meetings and Data Collection

There were numerous meetings between the two retailers during the course of the longitudinal studies, outlined in Appendix 4, which contributed to developing an overall picture of how each one operated their colour development processes. A summary of their practices and information gathered during the meetings is outlined below.

7.6 Retailer A

The initial meeting with Retailer A took place with a range of different staff to determine the best way forward within the organisation for the study, and who should be involved in subsequent meetings and briefings. The colour team were to be involved comprising Andrew, Tara and Sally, as was the Design Manager for Ladieswear, Jo, co-opted into the colour team. In subsequent meetings, and informal discussions, the Womenswear Product Director, Nell was also involved. The initial meeting outlined the strategy of Retailer A in respect of colour development and took place in early December 2004. In 2004 it was decided that the design managers and central colour ordering would all be brought together to rationalise the colour libraries, lab dips and other colour information required by the various divisions within Retailer A.

It was a significant time in the development of the organisation, and the newly formed colour team. Its initial goal was to have 70% of colours within the Spring/Summer colour palettes approved early in the critical path, with the remaining 30% being fashion or trend colours, and able to be approved later in the cycle using fast fashion principles.

Complicating this somewhat was the need to have all colours approved by their parent company in the US, thus requiring the team to present the colours in early January, following early decisions by the design teams. Under the previous system it would have been March before the colours were first selected, waiting for the influential colour and fabric trade fair in Paris, Premiere Vision. To help develop colour ideas the design and colour teams subscribed to a number of colour trend forecast publications. These comprised:

- Trend Union
- Peclers
- Promostyl (Kids only)
- Nelly Rodi
- Carlin (Lingerie only)
- MRK (lifestyle publication)
- WGSN (online service)

It is interesting to note both the range and format of subscriptions, and also the specific companies used for individual product areas, such as Promostyl for Kidswear and Carlin for Lingerie. It transpired that this was due to individual design managers preferences for specific publications.

Subsequent meetings were more in depth, featuring a variety of staff, where colour boards were presented and discussed, critical paths disclosed and colour transitions through the seasonal discussed. The colour team continued to progress their work despite many reshuffles at head office, management changes and new working methods. The process of developing colour for Spring Summer 2006 and 2007 was provided and analysed to indicate how the process evolved, from the trend forecast publications selected through to the final sign off dates for the colour palettes.

7.7 Retailer B

The contact with Retailer B was made through the Menswear Design Director, who recommended further discussions with the senior menswear colourist, William. The initial meeting took place in early March 2006 when William had only worked for the retailer on a full time basis for six months. Prior to that, he had worked on a part time freelance basis with the company for over four years, so was fully conversant with the colour development practices. There were a variety of brands at Retailer B, each of which needed its own

colour palette for different target customers and markets, which have been coded as A, C, BH and V.

- A – Designer led, more experimental
- C– Older, more luxurious style
- BH – weekend, casual wear
- V – Mid range customer profile, vintage looks.

In addition, there were essentials such as shirts, socks and underwear, although the men's shirts tended to buy direct from the mills, using their colour inspiration and fabric developments rather than using the retailer's colour team information. Fast fashion was being introduced gradually – completely separate to the seasonal colour palettes, and usually turned around within 10 weeks from concept to product. It appeared likely that there would be further widespread introductions of fast fashion colour palettes in the future as seasonal phases pass so quickly. The menswear team worked on colour palettes 12 months in advance of the season, and merchandise reaching the stores. The process usually began with a 'closed week' where all the designers meet together to discuss colour trends and directions with William and each other. Usually by this time the key forecasting books for the season have been published, and with a budget of £10k per season, there are a variety of books purchased. Some tend to be bought year after year, as they have good solid trends which prove reliable. William's comments on these have been included.

- Peclers – good all round
- Dcipher – good tonal colours
- Trend Union – excellent imagery & menswear colour
- Chiron – Italian fabrics & colour, good imagery & textures
- Carlin – good for the B H casual range

Other publications are tried each season, and the selection varies according to William's taste. He has the ultimate decision regarding what to but and what not to buy. Recent purchases included Nelly Rodi and The Mix.

In closed week colours are developed and distilled from the books plus a wide range of other sources and usually starts with the development of numerous trend boards. For Spring/Summer 2007 there were sixteen initial colour trend ideas, which are subsequently filtered down to twelve. All these colours are fashion colours as the team no longer includes its core colours in the closed week process. At that stage there may be as many

as thirty fashion colours for each brand selected. A trend board from the colour samples and imagery is then scanned in and compiled by the CAD team, and reduced into A4 format. William starts to write about the colour directions to help inform the teams of designers and buyers, plus the colour management team, who are primarily concerned with the technical aspects of colour – ensuring a t-shirt in aqua matches a stripe in a sweater.

The new trend sheets may also include fabrics, pattern, accessory ideas as the team don't rely too heavily on the trend books; neither do they use independent colour trend consultants for the process. William also travels with the various brand teams and does a considerable amount of comparative shopping prior to closed week, spending up to £30k per season in LA, NYC, Paris, wherever they think influences may be coming from.

Eventually, via a consensus, the stories and colours are reduced to two stories per brand, per season, using more of their own colours. It is important for the teams to review how seasonal changes sit together, as it's likely they will be in store at the same time, presenting a harmonious range on merchandise on the shop floor. The reduction in the colour palette develops through the amalgamation of similar tonal colours into one, and the focusing on the overall look of the season. It is usually around fourteen colours, which does not include core colours.

7.8 Colour Development in the Critical Path

Each retailer has slightly different approaches to colour development and the timescales used within their business models. The colour team in Retailer A started working on colour far earlier in the cycle than Retailer B, up to 6 months earlier in the case of a spring summer season. Each team worked on several seasons or phases at any given time, but in order to clearly understand the colourists role, one spring summer season was identified and related activities separated out in to a comparison chart, Fig. 7.2. It is clear from the chart there are some differences in approach from each retail groups.

	Oct	Nov	Dec	Jan	F	March	April	May	June	July
Retailer A	Prepare overall colour trends for Spring Summer	Present cols to global teams	Colour workshops to individual teams	Global team feedback	Final work shops	One central board with reduced no of cols	Palettes received & reviewed			
	Prepare colour workshop	Colour workshops to individual teams	Review & order trend books	Final colour board complete	Des Mgrs commit to final colour stories	Put final cols to lab & agree deadline	Review design packs			
			Present colours to global teams	Present final palettes	Colour stories phased	Update Design Managers on final colour names & numbers				
				Printed fabrics work shop						
				Distribute colour pack with colour refs to global teams						
Retailer B					Spring Summer buying week – work shops begin	Designers & Buyers shopping	Work shops for teams	Range build continues	Mens wear monthly meeting	Summer samples due in
					Closed week - designers develop trends	Closed week design & buyers	Design briefs	Spring Summer signed off		Buying week - brand & catalogue
					Mens wear monthly meeting	Monthly strategy developed	Range build	Supplier briefings		Depts sign off
					Publish initial Spring Summer colour overview	Menswear monthly meeting	Mens wear monthly meeting			
					Trade shows & Paris shops					

Figure 7-2 Timescale for colour teams in Retailers

Figure 7.2 illustrates that Retailer A's colour team began the colour development process far earlier than in Retailer B, four months earlier. Consequently the colour team at Retailer A finished far earlier and was able to sign off the colours very early in the buying and production cycle, given that the goods were not due in store until the following January or February. As Retailer A was a more global business with its headquarters in the US, all colour had to be approved early in the cycle by all international teams and markets, and any changes made according to local cultural colour preferences. The colour teams at Retailer A also worked across all areas of the business, and so had a huge task in terms of briefing all the design and buying teams and finalising their colour palettes. At Retailer B the colours were developed for a far smaller range of menswear brands, thus were more contained with fewer palettes required. William also commented that 'menswear is slower and evolutionary in colour terms with different lead times according to the products.' but he agreed that he was always looking 18 months ahead and never looked backwards.

The only real correlation between the two regarding colour was that it was incorporated into the design and development processes right at the beginning of the cycle, supporting previous literature in the field.

7.9 Data Analysis Methodology

Each retailer was asked about their approach, methodology and strategy toward colour trend development for the season during each visit. Using a grounded approach, as in Chapter 6, and through a system of open coding the discussions during the meetings, several areas were highlighted as being critical to the retailers colour development strategies, including the impact of everyday working practices, sources of colour trend information, colour palette development and the business case which drove colour consistency through a wide range of products.. Additional abstraction was used to raise the level of the commentary toward the development of theories, and subsequently to axial coding, in which relationships are specified and a core concept is identified around which other the other concepts revolve (Goulding, 2002), a number of key areas which theories can be derived from have been developed across four areas discussed below.

- Working Practices
- Colour Information Sources
- Colour Palette Development Strategies
- Business Case

7.9.1 Working Practices

This area considered a range of factors which impacted on the everyday working practices of the colour teams from each retailer, ranging from the number of trend boards and colours required for each brand or seasonal phase, to the compilation of trend books for the dissemination of the colour developments to in house and external teams. Of considerable note was the revelation from Retailer A that they were to start investigating why some colours sold better than others within their stores. Due to management changes at Retailer A the focus from this changed slightly during the course of the study, but later follow up interviews revealed that their new Managing Director was once again placing a greater emphasis on analyzing colour related to product sales.

7.9.2 Colour Information Sources

One of the most illuminating topics concentrated on how the retailer's own colour palettes were initially conceived; where did the initial inspiration come from, and how could that be sustained season after season in order to produce original palettes? Within the subject area the coding focused on the trend books the retailers purchased, which trade fairs and fashion capitals they visited, how the internal teams worked, and how they utilised their in-house colour libraries,

7.9.3 Colour Palette Development Strategies

The focus was on the range of brands or product areas covered by the colour teams, and their differing requirements, the development of the initial colour stories by the teams, the range of colours used and the technical issues therein. Additional areas included the presentation of colours to the design and buying teams and the background to the two different company approaches.

7.9.4 The Business Case

The business case appeared to be the main factor associated with many initiatives such as the rationalization of the number of colours used each season, early development of colour palettes and the quality assurance required through the entire colour management process each season. Accuracy was important as the wrong colours, unpopular with consumers, could result in a lower overall sell through, and higher percentage of discounted goods.

7.9.5 The Role of Electronic Point of Sale (EPOS)

Regular weekly meetings were held at each retailer to discuss the previous weeks' sales and analyse performance against predicted sell through rates. The meetings usually included the buyers, merchandisers and technical managers, even the finance directors and retail operations directors, but not the colourists. At the meetings discussions focused on items selling well, how the weather, store location, fabric choice, colour or

style impacted upon sales and identify merchandise to reorder, discount, or phase in early from another season.

Data presented at the meetings is gathered via EPOS, and can be found on the garment swing ticket, encrypted within the barcode. It includes the number of units sold at specific stores, size, price and colour and is usually transmitted to head office once a week (Sichel, 2008). How companies deal with the data varies; some retailers look only at full priced merchandise (Retailer A), others look at the full range of merchandise irrespective of price. Weber & Kantamneni (2002) found the implementation of EPOS systems helped retailers maintain inventory values, incur fewer markdowns, and strengthened inventory management so retailers held reduced stock levels and experienced less out of stock products, but did not explore the role of the data from a design and buying perspective.

Both retailers used the data in different ways; teams or individuals responsible for colour development within each retail operation were not always involved in the data analysis or decision making processes which resulted in changes being proposed for future colour trends. Usually senior management were involved in the data analysis, and eventually the data regarding colour might filter down to the colourists, but not always. In particular, Retailer B had a very heirachical structure; as the colourists were situated much further down the heirachy, it took time for information to reach them. William, senior colourist at Retailer B said he had never changed a colour palette as a result of the EPOS data, and had not been asked to develop new colours as a result of it; he was kept out of the meetings as 'everyone thought they knew about colour'.

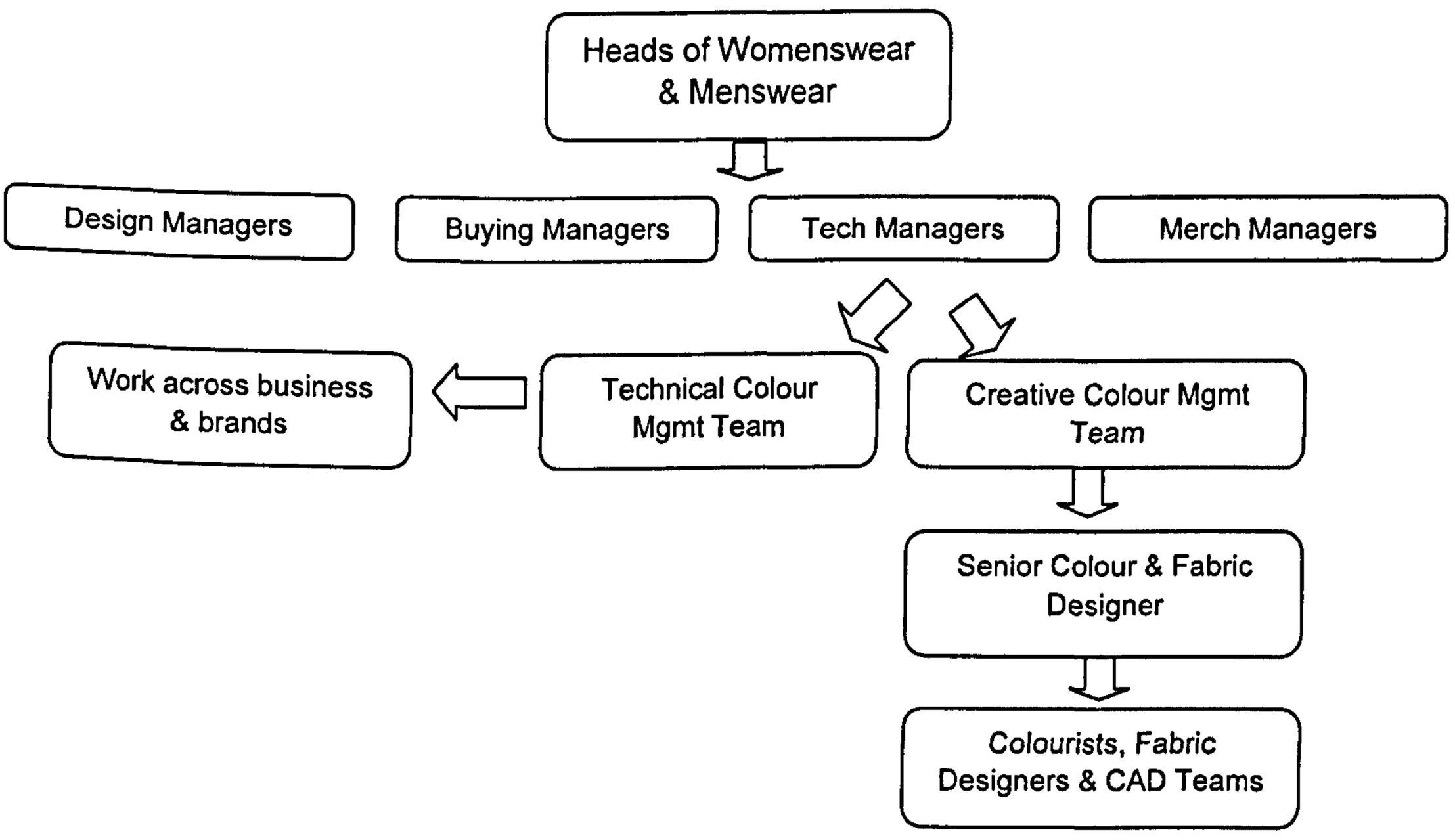


Figure 7-3. Retailer B Hierarchy within teams

As outlined in Fig 7.4, at Retailer B the teams were very hierarchical, and those involved in the weekly update meetings where EPOS data was discussed comprised the top layer of Design, Buying, Technical and Merchandise managers. Within Retailer A the situation was more polarised with only the Managing Director and other Directors involved in the first stage Monday morning EPOS analysis meetings.

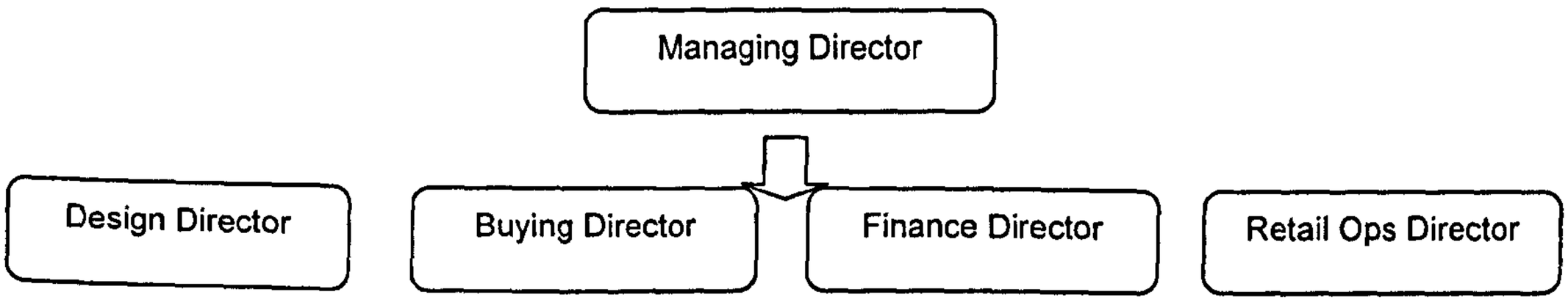


Figure 7-4. Retailer A Hierarchy

The meeting at Retailer A is undoubtedly at a much higher level, but all the information was subsequently cascaded down to the department team level very rapidly with the conclusions of the Directors and their instructions to the teams regarding what actions should be taken to rectify any outstanding issues. One such example cited involved ladies jerseywear which appeared to be perfoming badly and experiencing declining sales. The buying and design teams were asked to look at the problem to identify the cause; was the product was off trend, maybe the colour, shape or fabric were wrong, or the merchandise and stock holding teams had not allocated the goods appropriately. In order to address the issue, the teams had to perform a 'deep dive' into the data to mine the information more specifically to assess what had gone wrong. The level of data and the specific colour information available varied between the two retailers considerably. At Retailer A it was recorded in great detail, with very specific codes assigned to colours, and then allocated into groups such as reds and berries, so it was immediately apparent what shade of red was referred to in the data. At Retailer B the information was more generic, specified only as a red, indeed it was not mandatory to have colour information in the Range Planner system, so it would not always be easy to cross reference. If further information was required regarding an exact shade of red, a time consuming manual search had to be performed to extract the information. Therefore Retailer A had the clearest picture of how colour performed throughout the store group.

The increased focus on colour at Retailer A was due mainly to the recent arrival of a new Managing Director; subsequently the level of analysis of EPOS data changed dramatically, with the information being used '100% more than it used to be' according to the teams within the company. Another change which directly impacted upon colour was the

generation of new colour reports, both on a weekly, monthly and quarterly basis. The data gathered was used to discern trends year on year. If a key fashion colour performed badly one year it would not be used again in the same shade, even specific washes for denim could be analysed using the same method. If a colour was not selling well, and more stock had been received in the same shade, it could be overdyed quickly. Conversely if a colour was selling quickly, more stock could be ordered if there was sufficient time to get it into stores.

Actions from the meetings were given to teams on the Monday morning and had to be followed up very rapidly, usually within a week as the supermarket retailer felt the pressure from its customers coming in to do the weekly shop and expecting to find new merchandise in store each time they visited. There seemed to be a far greater sense of urgency and follow through on colour than ever before according to the teams. The approach to Retailer A's EPOS analysis is illustrated in Fig. 7.5.

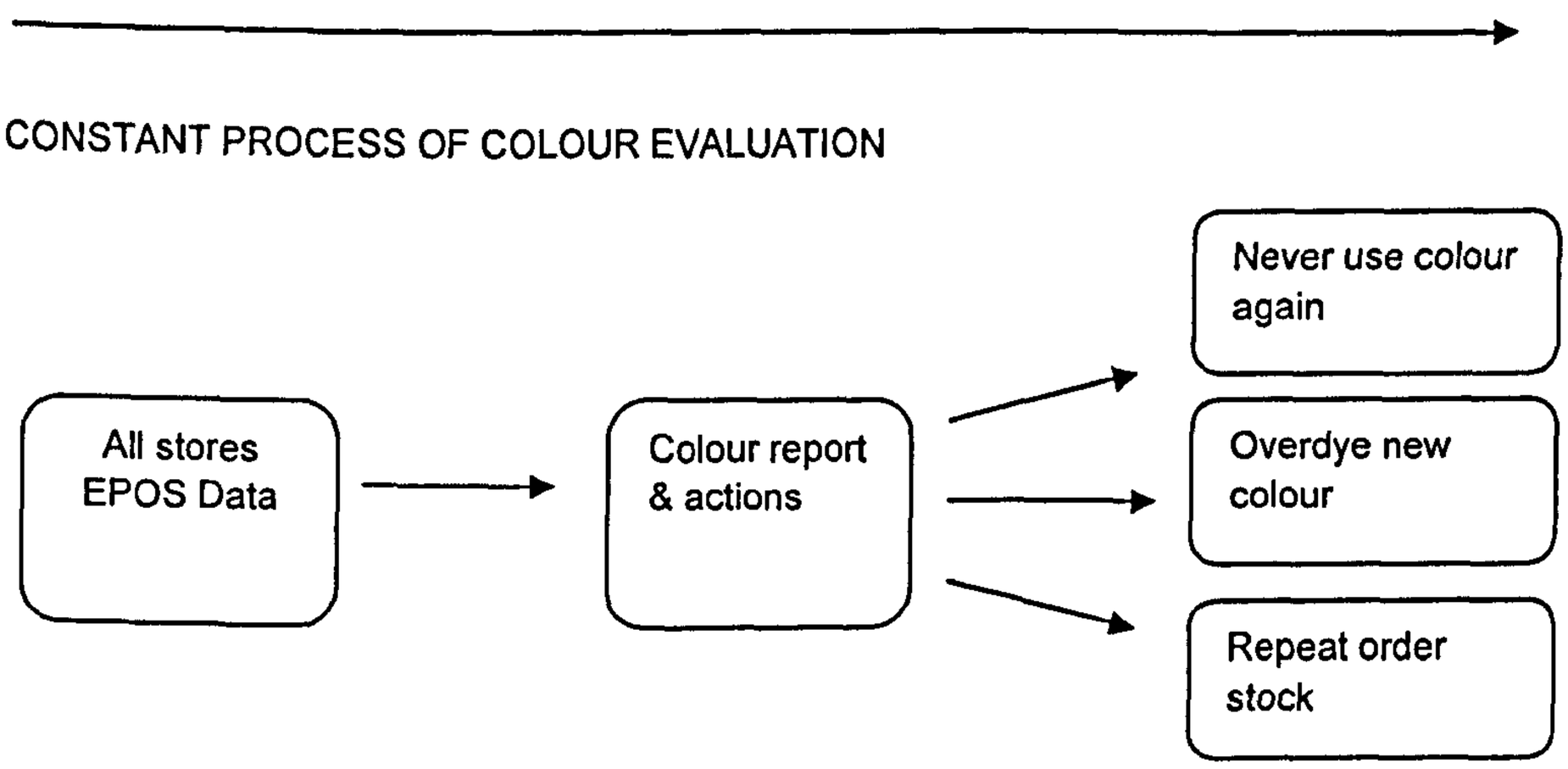


Figure 7-5. Retailer A Colour strategy from EPOS data

The approach at Retailer B was somewhat different, experiencing a far larger number of iterations before specific decisions were made, and making most decisions during the pre and final selections stages of the design and buying process. The other major factors included the analysis of only their top 10 'assessment stores' and only analysing the top twenty best and worst performing garments. They explained this was due to the vast quantities of products sold – 4 million ladies tops in one week. However, Retailer A experienced similar volume sales yet still analysed all sales figures on full price merchandise for anomalies. The notable difference was flexibility in both retailers to phase in product early from the forthcoming season, used regularly by Retailer B but not so much for Retailer A. Each retailer agreed if a colour performed badly they would probably not use it the following year in their range planning.

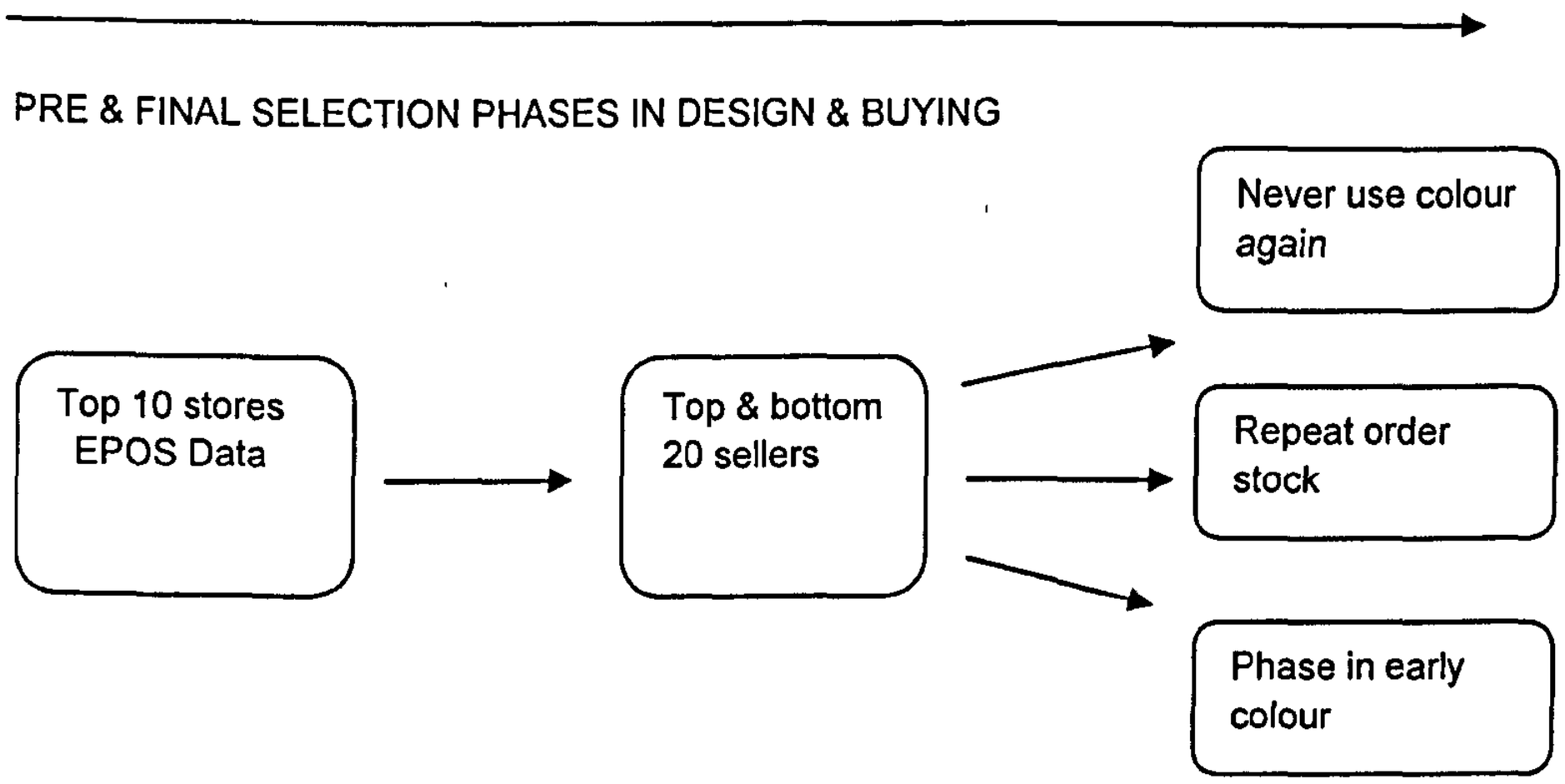


Figure 7-6. Retailer B use of EPOS data

The EPOS data and approach to analysing the information generated by the system clearly varied between the retailers as Figs 7.5 and 7.6 illustrate, and it is not clear which has the correct strategy in respect to how colour is managed, nonetheless it is apparent Retailer A is more focused on analysing colour than Retailer B, which could be due to the wide range of sub brands within Retailer B with a core or classic colour signature. The area of difference was cited by Retailer B when they sometimes decide to go 'off palette', bringing in more high fashion colours at the last minute on basic products such as tshirts, and the more trend led pieces from their fast fashion range. Such last minute decisions account for only 10% of core products and are relatively insignificant. Retailer B's colourist had been asked to produce colour palettes within a day more recently, and he has had to respond far more quickly in recent years than when he first joined the company. Although Retailer A moved away from fast fashion, it was still able to react quickly if a colour was not performing well in store to rectify the problem. Such flexibility negates to some degree the need to substantially improve accuracy rates of a colour, although correcting such mistakes is obviously not cost effective in all cases for the retailers.

Interestingly, whilst Retailer A was trying to rationalise its colour library and establish more colour standards across the global business, Retailer B had expanded its library to over seven thousand colours in recent years. Retailer A's rationale behind this was that a smaller, more focused colour library would allow them to use just two or three shades of camel in their ranges, instead of over 10 as in previous years. This would reduce the number of lab dips required, and thus save them time and money in the colour development process. A lab dip is necessary when a new colour, not already held within an organisations colour library is required for the season. In order to achieve the exact colour required, the organisation send a sample of their new colour to the dye lab. This is

in turn mixed to exactly the right shade and analysed so it can be carefully re-dyed to the exact specifications anywhere in the world, on a variety of fabrics and finishes. The process takes time; up to four weeks for physical samples to be returned from a lab. Retailer A was starting to experiment with an internet enabled system which developed colours virtually to the exact recipe, and thus would radically reduce waiting times. Traditional lab dips were also costly, approx £800 each, and with Retailer B spending over £350k on lab dips in one year, the cost savings to be made were significant.

Several years ago the average number of colours for a Womenswear season at Retailer B was between 30–40, but now it is over 400. There are some core colours such as white and black, but the increasing range of colours in the library is astounding when the cost implications of lab dips and iteration between the dyers, suppliers and retailers is considered.

7.10 Analysis of Working Practices

By coding the regular working practices of the two retailers in the longitudinal study, it became apparent that their work was fundamentally the same, driven by the organisational influences which created specific nuances. Figure 7.8 shows the key working practices involved on the colour decision making process for each retailer.

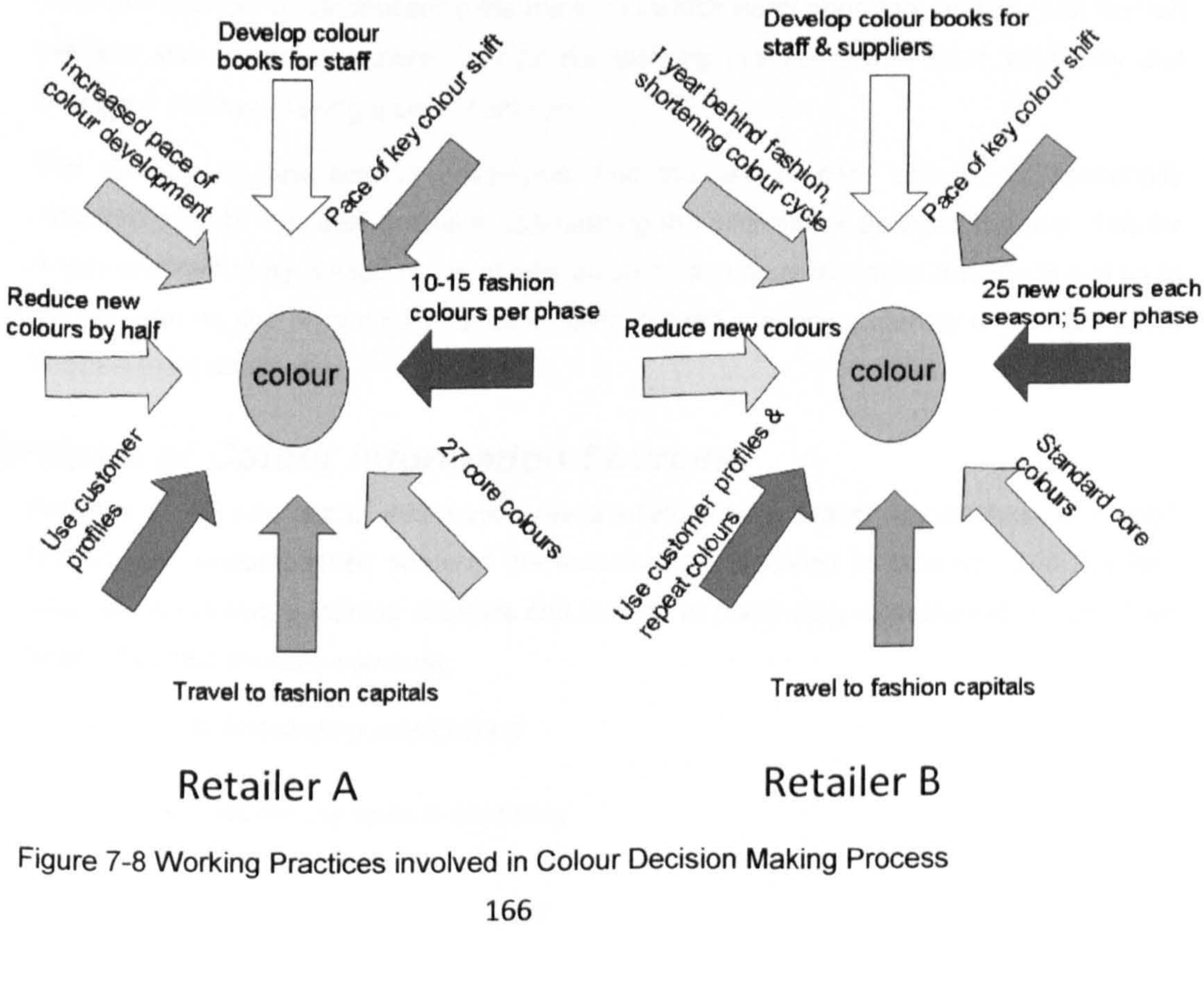


Figure 7-8 Working Practices involved in Colour Decision Making Process

In developing new seasonal colour palettes, the colour teams studied were subject to a range of working practices, many of which were similar for each. Figure 7.8 must be taken in context with Figure 7.9, Colour Information Sources, as these are inextricably linked. When developing new colour trends, the teams had to travel to key fashion capitals for inspiration with the design and buying teams. However, the manner in which they approached the visits, and their importance in the colour development process was quite different when Figure 7.9 is studied. Each retailer also used its own customer profiles to develop colour, although Retailer B declared it was about one year behind fashion trends in colour terms. Retailer A, increasing the fashion content of its product offer, was far more focused on using high fashion colours within all areas of its business.

Retailer A also used a far wider range of colours overall, including core colours, with Retailer B introducing only five new colours to its core range for each phase within the season in comparison to ten to fifteen introduced by Retailer A. Each colour team had to prepare trend books for the design and buying teams to work from. The key difference was the distribution of the books; Retailer A's books went to all teams in their global business, and was sold to their suppliers. Retailer B had its UK teams, plus a few global suppliers on its distribution list.

7.10.1 Summary of Working Practices

Each retailer had similar working practices, but with slightly different emphasis on each. This was due in part to the global nature of Retailer A in comparison to the relatively parochial Retailer B. Undoubtedly the market in which each operated, and the fast fashion element also impacted substantially on the working practices, with price sensitivity and consumer profiles playing a significant role.

The quantity of new colours developed, and the use of core colours, or seasonally repeated colours was also crucial in establishing the differences between the two. Retailer A was unafraid to try a wide range of new colours each season, whilst Retailer B looked to its core colours and repeat colours, developing instead a stronger identity and sense of the brand with its continuity.

7.11 Analysis of Colour Information Sources

Analysis of the sources of information reveals remarkably similar approaches from each retailer, and encompassed some of the techniques advocated by Brannon and Sproles, such as performing a fashion analysis and looking at continuing, or historical trends. The most influential sources comprise:

- Trend forecasting publications
- Inspirational city visits & shopping

- Trade Fairs
- Continuing or core colours
- Trend consultants

Each retailer used the above in unique ways, with the diagram illustrating the amount of influence each had on the colour team's development of the coming seasonal colours. One of the key factors was the reference made to the trend books. Although each retailer purchased seven different publications from the major forecasting names including Peclers, Carlin, Nelly Rodi and Promostyl at the first meeting, each subsequently changed their purchase decisions throughout the series of meetings. The multiple purchases are very much in line with Guerin's (2005) suggestion that it is common practice for retailers to invest in a selection of forecasting publications. Retailer A began to purchase more trend books, whereas Retailer B reduced their purchases and reliance on trend books. From Fig 7.10 it is clear where the focus for colour development lies within each organisation, and how each differs.

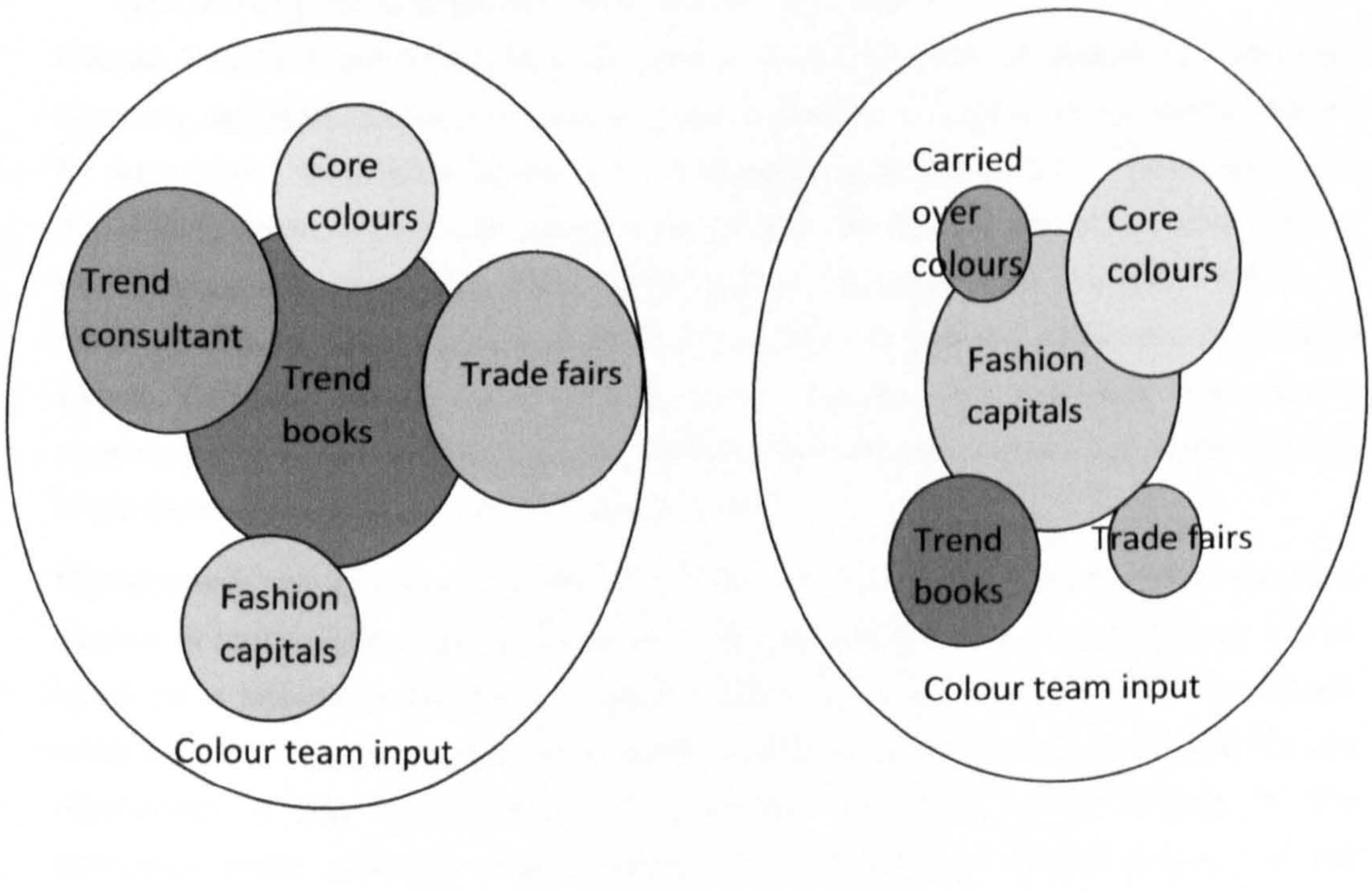


Figure 7-9: Colour Information Sources

Both retailers carried out inspirational shopping trips to fashion capitals, but Retailer B visited a wider range of cities and placed more emphasis on the colour development process on these visits. Likewise, both retailers visited trade fairs for inspiration, but for Retailer B they were becoming less relevant to the process. Retailer A introduced their own trend or lifestyle consultants, who arguably performed much of the international lifestyle research carried out by retailer B through their travelling, bringing it back to the colour, design and buying teams at Retailer A.

Core colours remained an important feature of colour development and continuity for each retailer, although Retailer B had more pressure to carry over successful colours from previous seasons or phases into the following season. In this respect, Retailer A were the most innovative, as they developed totally new colour concepts each season without relying on the previous season for colour direction. This was as a result of a focus on fast fashion for a period during the research. This approach changed in 2008 with the retailer cutting their fast fashion lines. By contrast, Retailer B does not have as much pressure on it to develop a large percentage of fast fashion, where colour concepts are all developed within ten weeks.

7.11.1 Summary of Colour Information Sources

Overall, Retailer B generated the majority of unique information, personalising it with their company signature to create their unique colour palettes throughout the seasonal phases for each brand. Retailer A focused on the predicted commercial information, distilling it and adding some of their own research to develop the trends. The theory that retailers use commercially published colour information to develop their seasonal colours is therefore proved correct in some part, but is subject to external influences from trade shows, company identity and practices, core colours and individual research to supplement and contextualise the commercially available information. It is these nuances which result in the final colour story development.

Market levels and branding are influential factors in the development of colour palettes; Retailer A had regular drops of apparel into the store each week, as did Retailer B, but relied more heavily on fast fashion, around 30%. As a supermarket, they were much more price driven, and experienced a faster turnover of stock as a part of the fast fashion mechanism. It was imperative to have newness and fresh colour choices for the consumer whilst retaining colour merchandising within the clothing section of the supermarket. Colour and price were two key methods of achieving their objectives, although they often featured markdowns in their stores with discounted products being available for forty nine weeks of the year in 2007 (Hall & Santi, 2008). As Retailer B had a much lower emphasis on fast fashion they had time to plan and fully phase their merchandise in store so the colour stories flowed through the phases and worked visually. This is also evidently linked to their strong branded lines and good customer

profiling. However, working at a slower pace did cause them to carry over colours each season, which could be difficult to incorporate into new palettes.

In summary, each retailer worked using broadly similar sources of information, adapted to their individual retail operating environments. Neither simply bought the commercially available forecasting information and used it verbatim, although Retailer A bought and used substantially more. It worked with a higher proportion of fast fashion merchandise, which logically would allow it to work closer to the season to improve colour accuracy. Due to its global business demands this was not the case for colour, which was still developed 4 months in advance of Retailer B's colours. Consequently, A experienced a higher proportion of markdowns than B, but excellent sell through rates for basic products in core colours. It would be better for A to develop new colours, in line with fast fashion timing, generated independently of commercial forecasting data, using more primary research to do so. This would provide a better overall sell through rate at full price.

7.12 Analysis of the Business Case

Throughout the longitudinal studies, it became apparent that both retailers were experiencing considerable changes driven by the changes in the businesses. Retailer A had lost their momentum with the departure of its Design Director, ironically to Retailer B, and was experiencing considerable management and buying changes. Retailer B was feeling the impact of a new Design Director, changes in working practices and structures.

Figure 7.10 illustrates the major influential factors on the business case during the period of research, in terms of what the organisations were looking to expand, reduce or maintain, and their key markets.

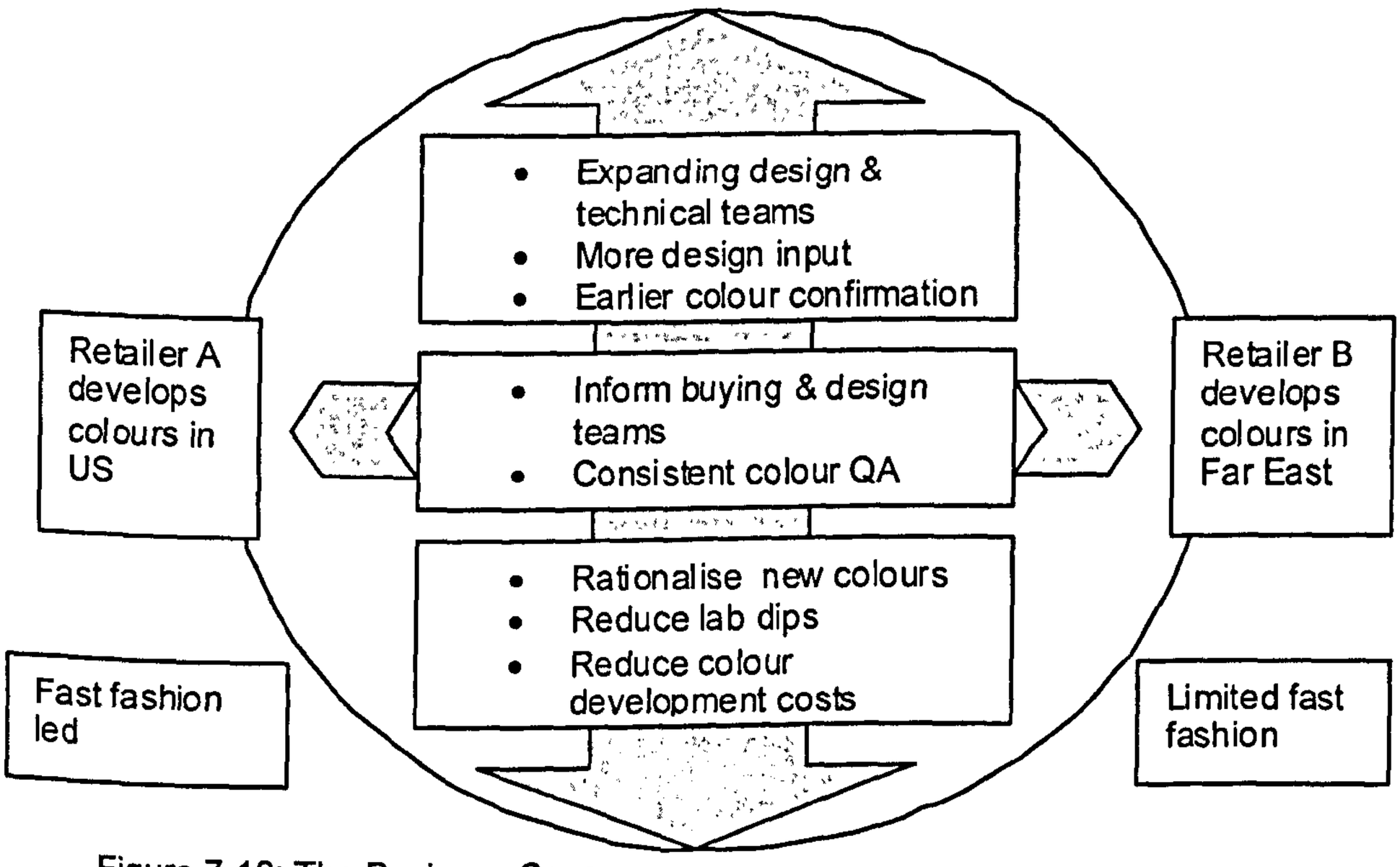


Figure 7-10: The Business Case

Both retailers clearly operated in very different environments; Retailer A had fully embraced fast fashion and was becoming more fashion led. Retailer B was using small amounts of fast fashion to supplement its traditional buying strategy. The common areas were around price, where driving development costs down was seen as vital in both organisations. In colour terms it meant a considerable reduction in the number of new colours introduced and thus the number of lab dips created each season.

Confirming colours earlier in the colour development cycle was another critical factor in the business case, particularly vital to Retailer A who had adopted the fast fashion model and were vigorously working to shorten their development cycles. Typically colour development would take twenty three weeks starting in early December 2004, with completion in early May according to their Spring Summer 2006 critical path. By Spring Summer 2007 work started in late October with colours finalised by mid March. Although the process had not been reduced by many weeks, it had started much earlier in the year, so colours were available and samples developed earlier in the cycle than previously. In contrast, Retailer B started their colour developments for Spring/Summer in early April and completed their colour decisions in early August; a four month turnaround on average. The key areas for both retailers was to retain quality assurance within the entire colour and range development process and inform the design and buying teams with the creation of trend and colour books, then subsequently roll these out to key suppliers.

7.12.1 Summary of the Business Case

During a period of increased competition in the UK apparel market, both retailers were driven by price. As the British consumer became increasingly attracted to the value or discount end of the market in 2004, the mid priced market struggled to retain influence (Datamonitor, 2004). During the period covered by the longitudinal surveys, crude oil prices were rising steadily increasing costs in terms of the transportation of merchandise, the cost of energy in manufacturing the products, and rising raw materials costs. These factors made trading conditions difficult, the emphasis was on reducing costs where possible, making the supply chain more efficient; colour development, the reduction in lab dips, and the number of new colours used by both retailers was a natural reaction to cost reduction across the industry. By expanding the design and technical teams, and increasing the merchandise fashion content, each retailer followed similar strategies, despite being at differing ends of the market. This was primarily in response to consumer demand for stronger fashion content, with Retailer A adopting fast fashion in many of its product lines, it signalled its intention to capture some high street customers.

7.13 Analysis of Colour Development Strategies

The colour development strategies within the retailers followed a similar pattern, although perhaps carried out during different periods, different durations and featuring company specific nuances. Clearly, no two retailers will ever have identical colour strategies, but it was interesting to note the synergies between the two. These have been compiled into Figure 7.11 below, from which it is apparent that in order to produce a final, agreed group of seasonal colours, each retailer used numerous iterations to reach the end product.

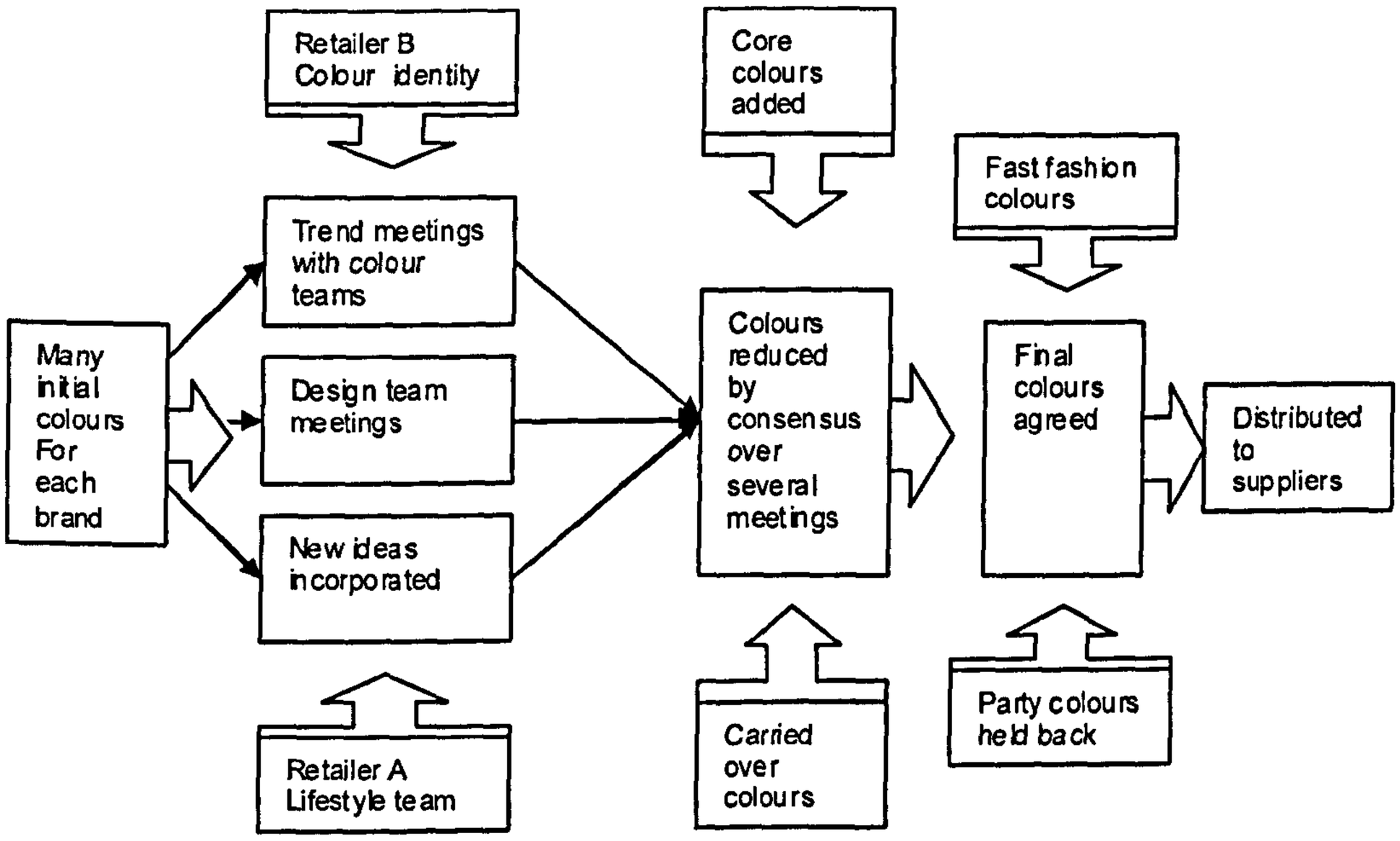


Figure *7-11*: Colour Development Strategies

Initially, both colour teams compiled numerous trend boards featuring inspiration from various sources; Retailer A focused solely on the commercially forecasted information for its initial trend board concepts, whilst Retailer B used these sparingly, and added their own concepts and thoughts on the season in question. The initial boards featured a wide range of colours for each brand and were quite generic at the time for Retailer A, whilst Retailer B targeted and focused on its specific brands. Each colour team then conducted a series of meetings with their in house design and buying teams. Within the meetings other factors impacted upon the development of the colour palettes, namely Retailer A's lifestyle trend team, and Retailer B's house colour signature.

Over a series of meetings the colours were gradually reduced in number by consensus; some tonal colours blended in to one, more challenging colours which may not have sold well previously for the retailers are discarded no matter how fashionable they are and each design director and buying team have their own particular colour preferences. The opinions of all involved in the process have to be considered, but it is the colour teams

who have the final word on the fashion colours selected. The appropriate core colours are added during the decision making process to complement and extend the colour palettes.

Eventually toward the end of the process, the final colours were identified for each phase in the season, any fast fashion colours may come in at a later stage, and some colours may be held back for the Autumn/Winter season for the party phase. Finally, after all the colours have been signed off, they are distributed to the suppliers, completing the cycle.

7.13.1 Summary of Colour Development Strategies

The key variables within the colour development strategies appear to be linked to company identity and the use of fast fashion or even high fashion. The initial development of trend boards and colours are compiled using different sources of information, or quantities from similar sources. Comparison of a range of commercially forecast colours and the subsequent distillation of these into actual retail colour palettes by Retailer A was of particular interest, as they appear to rely far more heavily on this process than Retailer B, whilst starting development earlier in the cycle. Moreover, there is the suggestion that all the published colour information they purchase is similar in nature, allowing little scope for an individual 'signature' to emerge for the organisation. Retailer B preferred to develop their own colours as they believed they understood their market and customers more, plus they had a clearly defined range of sub brands which required specific identities in order to appeal to their customer segmentation.

If, as was suggested, commercially produced trends are 80% accurate, localized adaptation of them aims to match them more closely with the retailer's brand image and increase their accuracy rates. This may be borne out by evidence from sell through figures, although it is wise to consider there are a broad range of factors which also impact upon sell through rates, the weather, garment style or fabric. Both had good sell through rates at broadly comparative levels, but A experienced more markdowns than B, indicating the product was not quite what the consumer wanted. Understanding the consumer further and adapting commercial colour palettes to suit the consumer, as Retailer B does, would help to solve some of the markdown issues.

The commercially produced colour palettes can be viewed as being homogenised, and lacking identity. In contrast, those produced independently by retailers for specific market segments have far more affinity to their brand and their customer, and may not always follow the predicted trends. However, if they still appeal to customers, and sell, the business case is well met.

7.14 Comparison of data from Interviews and Longitudinal Studies

When a comparative analysis was made from results from the longitudinal surveys in this chapter and results from the interviews with practitioners in the retail sector in Chapter 6, some interesting facts emerged regarding basic information; which companies used

forecasters, developed their own trends, and used EPOS data to determine future trends. This can be seen in more detail in Fig. 7.12. below.

Retailer segment	Research method	Use forecasters	Develop own trends	Use EPOS consumer data
Supermarket Retailer A	Longitudinal study	Yes	Developed from forecasters info	None used until 2010 Core colours retained.
Top Shop, high fashion	Interview	Yes, one only	Developed own in house range, no forecasted cols.	None used, have signature colours. Core colours retained.
Major retailer multiple sub brands, Retailer B	Longitudinal study	Yes	Mainly own colours	Starting to develop and use more in depth systems. Core colours retained.
Next , High St, mass market	Interview	Yes	Mix of own & forecasted colours, 50/50.	None used. Core colours retained.
Per Una, own brand concession	Interview	Yes	Mainly forecasted colours, some own.	None used, Core colours retained.
Performance fashion brand , Timberland	Interview	No	Own in house colours	None used, signature colours.
Shop Direct, Multiple brands, up to size 32	Interview	Yes	In house colourists work with freelancers and designers on colour	To review past sales & identify markdowns Signature & core colours used

Figure 7-12. Results from retailer interviews & longitudinal surveys

It can be construed from the data in Fig. 7.12. that the companies with higher fashion content, such as Top Shop. Other retailers who based colour development around their customer profiles were Timberland and ShopDirect. Each have very specific requirements; Timberland customers are mainly interested in high performance clothing with far less regard for high fashion colour than the other brands, so it is easier for the company to develop their own colour palettes with a minimum of commercial forecasting information. Shop Direct have a wide range of brands, many of which are available in very large sizes,

up to a size UK 32. This in itself poses significant issues with garment development, as a size UK 10 garment will naturally look quite different when sized up to a UK 32. Consequently, the company's brands work closely with specific signature colours which they recognise are appropriate for their larger sized customers.

Interestingly, most companies did not use EPOS information extensively to develop new seasonal colour palettes, but rather to strengthen their core or signature range of colours by excising unsuccessful colours from their ranges in future seasons. Sometimes this was earlier in the season than planned, modifying potentially poor selling colours from an approaching season by over-dyeing stock wherever possible to change the colour. Virtually all retailers acknowledged they worked across their design, buying and technical teams to look at the information for the following season or even year, to determine what colours could be carried over in a similar hue. All retailers mentioned they have strong core colours which are continued year after year, and three of the seven mentioned that signature colours were important for them and their customers too. Products in core colours sold strongly without need for discounting, so increasing the number of core colours in a season for mass market brands would potentially improve sell though rates overall and reduce the proportion of discounted merchandise, ultimately improving the accuracy of colour palettes.

The implications from the comparative analysis are that fast fashion, and niche markets demand a slightly different approach to colour development. It was discussed earlier in the chapter how Retailer A had introduced elements of fast fashion far more than Retailer B, necessitating a quicker turnaround of design concepts and products, but colour remained relatively stable, developed early in the critical path. The fast fashion approach used by Top Shop, who market themselves as being at the very forefront of fashion trends in the UK, demands a far faster, responsive approach to colour and product development, one which would not always work well with all retailers, their target markets or with an increased reliance on core colours. However, Top Shop do not work exclusively to fast fashion principles, but clearly know their customer well enough to be confident in selecting their own colour palettes and setting trends.

The evidence indicates specialist retailers, or high fashion retailers often prefer to develop their own colours to ensure they are more accurate, and use more unique, or signature colours as a result of their target markets. They rely less on EPOS figures to develop colour trends for the coming seasons or make mid season changes to colour. The mass market, high street fashion, appear to use forecasters in varying proportions, and the indications are that the value end of the market is the biggest user of commercial forecasting information, but the most avid users of EPOS data, not afraid to overdye or withdraw a colour if it is not performing well.

7.15 Summary

Increasing competition on the UK high street from the value led retailers, the impact of the economic crisis from 2008 onwards, and unusual weather patterns experienced in the UK in recent years, have left retailers and their supply chains in a potentially precarious position. The need for products to be on trend in order to sell is indisputable Mintel, 2008), and has been proven over many years (Brannon, 2000, Perna, 1987) Moreover, with colour acknowledged as the initial stage in the product development process, organisations are focusing their attention on delivering the correct colours to their suppliers earlier and earlier. Both retailers involved in the longitudinal studies were in the process of adapting their colour development processes in order to become more efficient, shortening lead times throughout the supply chain, and their critical paths. Fast fashion has increased the pressure on the colour elements of the trend cycle to deliver product in store within a six week development and manufacture process (Bruce & Daly, 2006, Birtwistle et al 2003), and the colour component in the chain has had to respond. Some believe advance colour information is still indispensible, and certainly many spinners, fabric mills and component suppliers need to be kept informed of on trend fashion colours far in advance of the season in order to have their products ready for their place in the critical path. The forecasters themselves, such as Janet Holbrook from Peclers,and Lynette Southall from Nelly Rodi, believe their creativity in the forecasts is their strength, and something the manufacturers, designers and retailers cannot function without.

In the critical path, it was clear that retailers began analysing and developing colour at a very early stage, but interestingly Retailer A began the process four months ahead of Retailer B, due in part to the very large global business and the number of individual markets which had local colour preferences which necessitated revision of some UK colour palettes to make them more accurate for their domestic market. This was despite its 30% commitment to fast fashion.

EPOS data was used very differently in each organisation, with the senior colourist in Retailer B never participating in any meetings where colour was discussed as a result of EPOS information. At Retailer A they had recently taken a very different approach to colour, with it becoming one of the major areas of analysis from the data. They reacted swiftly to poor sell throughs in specific colours, able to overdye or change existing stock and orders to satisfy market demands. Both retailers used the information to occasionally 'blacklist' or drop colours from their colour palettes either mid season or more regularly, year on year.

Throughout the course of the longitudinal surveys, it was evident that colour information and inspiration came from essentially the same sources; trend books, trade fairs, designer catwalks, visits to fashion capitals and even trend consultants were all quoted as sources.

However, it was the proportion of input from these sources to the final colour decisions which varied significantly. Each retailer sampled a number of colour forecasting publications, comparing them and adding their own personal findings and brandsignature to the new seasons emerging colour trends. The more global operation, value lead Retailer A, had to manage a number of international markets, so their fashion colours introduced each season were copious in contrast to the more conservative Retailer B, who used a large number of core and signature colours each season, although they had significantly expanded their colour ranges and number of seasonal colours in recent years.

Core colours were identified as being the backbone of both retailers collections; black, navy, cream, white, grey and other neutrals were repeated season after season, irrespective of trends or weather patterns. They sold well as consumers were familiar and comfortable with them. Brand identity was important for Retailer B, thus they concentrated on consolidating their signature looks with colour palettes and classic styles far more than Retailer A. This allowed them to be more accurate in their colour palettes as they knew their customers well, and what they colours they might want each season. Overall they were less adventurous with their colour, yet invested more in developing a signature style, determined not to copy the trend predictions from commercial forecasters. Their reduced focus on fast fashion in comparison to Retailer A also allowed them to plan their colours far more independently, although their colours were more conservative overall. This would indicate that the length of time taken to plan colour is not always indicative of its success or failure, as Retailer A experienced far higher levels of markdowns in their merchandise than Retailer B (Hall & Santi, 2008). There was far more time to plan phases of merchandise and manage stock drops in colour phases and subtle seasonal changes within Retailer B, resulting in fewer markdowns. Visually, Retailer B's stores looked better colour coordinated which would help to make it more attractive in a competitive, price based market (Datamonitor, 2004).

In pure financial terms the preferred approach would be to use the model based on Retailer B, using core colours, developing signature styles, and carefully planning the development and phasing of a wide range of colours into store, using fast fashion in a limited manner. This brought better sales performance overall, but would perhaps not result in inspirational or trend led merchandise which Retailer A certainly focused on far more. As consumers apparently retain 70% of what they see, in comparison with 30% of what they hear or read, the visual is clearly the most important tool the retailer has in attracting customers and selling product (Easey, 2009).

Each retailer was making cost savings within its colour development process, whether it be from reduced lab dips, iterations with manufacturers, or costs of buying commercially produced early colour information. As indicated previously, the bottom line in fashion retailing, as in any business venture, is making profit, and this was certainly the objective

of both parties, even if they adopted different approaches in order to achieve their goals. Perna (1987) summarised this perfectly over twenty years ago, and the evidence suggests nothing appears to have changed since her book was published.

'Designers are judged by the rightness of their predictions and bottom line profits, not only by their own financial backers, but by the press and by retailers – and most importantly by the consumer.'

(Perna, 1987:34)

More recently, McKelvey & Munslow (2008:88) still assert that colour is the most important element of the product development process.

'Colour is taken very seriously in the industry....the decision can be disastrous for that season's sales figure; big brands and retailers can loose millions over the wrong colour palette.

The analysis of EPOS data and the changes made as a result of it, specifically at Retailer A appear to endorse their view. The research questions posed were largely answered from the longitudinal surveys, as they revealed how colour fit within the critical path and supply chain, at multiple points within both dependent on the amount of fast fashion a retailer adopts, and how colour information was compiled, the sources of information and the importance attached to each of these sources.

A comparative analysis of the longitudinal studies and the interviews with retailers in Chapter 6 revealed further evidence of the diverse approaches to colour palette development, the use of commercial forecasting information, EPOS data and core colours within UK organisations. In general it appeared that the higher the fashion content, where retailers were seen to set the trends, or trade in more specialist markets, the more colours were developed in house with less commercial forecasting input. These retailers used less EPOS data in season to change existing colours and precipitate markdowns. Mass market retailers used a mixture of their own colours and predicted colours, with the value end of the market purchasing the most forecasting information and synthesizing it into homogenous colour trends. Interestingly the value sector used EPOS data more extensively in season to examine sales performance of specific colours, and were flexible in changing the colour of merchandise by overdyeing or changing orders to avoid being left with large amounts of stock overall.

What are the conclusions from these diverse practices within the retail sector? High fashion usually equates with being responsive and using fast fashion methods, so traditional timescales of colour palette development used by forecasters is no longer as appropriate for this new way of working. Many retailers today use fast fashion to

supplement the majority of their merchandise (Bruce & Daly, 2006) and so will need to develop some colour palettes very quickly, using what information they already possess, but the majority of their merchandise is not fast fashion, and so they can take their time to use trend information published 18 months or a year in advance, as a part of their normal product development lifecycle and critical path.

Suggested accuracy rates of 80% from commercially produced palettes can be changed by the end users as they incorporate their own consumer colour preferences and signature colours. This can subsequently increase or decrease accuracy of colour. Judging this using sell through rates of merchandise at full price is the best way to measure this, although not conclusive. Basic products in core colours were found to have the highest overall sell through rates of 95%, but fashion colours fared far worse at between 30-40% before merchandise was discounted, and between 70 – 80% sell through in total. Therefore, indications are that increasing the number of core colours in a range would improve overall sell through rates.

8 Investigating Cycles of Influence – Research Findings

For whatever reason, the colour design cycles align, more or less, with each decade of the twentieth century.'

Hope & Walch (1990:301)

8.1 Introduction

It has been established in previous chapters that developing accurate trends is vital if the commercial forecasters, trend consultants and the wider forecasting and retailing industries are to achieve their goal: selling product, yet anecdotal and unsubstantiated evidence indicates only 80% of forecasts at best are accurate. Indeed, as establishing accuracy is one of the key objectives of the research, a comparative analysis of trend information and an understanding of how the market has changed in the last three decades was undertaken, examining two forecasting archives and comparing them with other forecasts, commentators and fashions of the time. The specific research questions related to the accuracy of colour trends and potential, predictable cycles focused on three aspects:

- Can colour forecasting be accurate if compiled over 2 years in advance?
- What happens if information is inaccurate?
- Can forecasts be made more accurate, e.g. by following established cyclical colour patterns?

In order to answer the research questions it was important to establish whether models which have been proposed for mapping colour cycles, such as Brannon's (2000), are applicable to contemporary colour forecasts. It is also essential to fully understand the lifecycle of a colour as it evolves over time, for example to appear darker, lighter, or become fluorescent over time, and which colours are used as short or long term colours, fashion colours or basic colours, or indeed appear in all segments. An example of this is white, which is a perennial basic colour but can easily acquire subtly different colour identities according to the base fabric or finishing processes used, the saturation (how much grey a colour contains), or the actual shade of white, and is also used as a fashion colour. Two colour trend archives were examined to aid the research and provide support or to refute the existing models and theories regarding fashion colour cycles.

Various analyses were conducted to establish parity between predicted colours from various forecasters, challenge the notion that there are identifiable, cyclical trends and

establish whether or not the predicted colours were translated into fashion products, thus establishing the accuracy of the forecasts. The analyses comprised a range of methods:

- Examination of colour trends from archives(Discussed in Chapter 9)
- Comparative analysis with fashion and colour trends from the period
- Anecdotal evidence from key informant interviews with forecasters, designers and retailers, and from the longitudinal studies (as discussed in Chapter 6 and 7)

It was also important to understand seasonal colour progression and how it influences colour prediction; as noted in Chapter 6, section 6.3, referencing to past colour predictions is used as an important source of information used by the forecasters when compiling their newest palettes.

8.2 Seasonal Colour Progression

It has already been established during the interviews and longitudinal study that colourists working in diverse organisations can produce similar colour information whether forecasts are developed in house, for publication or on-line at varying times within the fashion development calendar, using similar sources of inspiration in different quantities and their expert intuition. The examination of the archives will aim to establish this further by comparing palettes from various forecasters during specified seasons in Chapter 9 for similarities. This could result in suggestions as to how colour forecasts could be made more accurate, and less costly in the future. Brannon (2000) believes this is not a 'colour conspiracy' but the result of the forecasters using the same information sources such as catwalk trends or trade fairs, to develop their colour palettes, as established in the longitudinal studies with the retailers. This was discussed in Chapter 6. However, some may use alternative data gathering techniques and sources of inspiration, as Raymond (2004) suggests. That colours undoubtedly are repeated, in particular core colours which consumers buy year after year, such as blues, neutrals, black and white, is not disputed.

Li Edelkoort suggested that recent revivalism in colour was derived from the catwalk, but that the colours used today bore little resemblance to those of the preceding decades.

'With a surge of brights currently parading the catwalk ... it is easy to mistake this colorful movement as a revival. Most fashion magazines have already labeled the color comeback as a return to the 60's and early 70's and seen it as a rekindling of the Pop movement. Yet a closer analysis of contemporary color codes teaches us the contrary.'

Edelkoort (2008)

Edelkoort indicated that contemporary colours had evolved, becoming more sophisticated and complex, and that there was a greater variety of colours available today's designer than ever before. This assertion will be tested in the examination of the archives in Chapter 8.

8.2.1 Rate of Change in Colour Trends

That colour is an essential component of fashion, and that colour development is one of the first chains in seasonal design development, commencing with the yarn and fabric manufacturers is not in question (Jackson, 2002). As fashion trends change, season after season, year after year, it might be expected that colour would also adopt a similar rate of change; However, the nuances of colour forecasting illustrate a more gradual development and evolution of colours within fashion. Forecasters, designers and retailers alike recognise that certain colours have a longer lifespan than others, and so are sometimes retained within a palette, updated by other, fresher colours around them, particularly if that colour has been a bestseller (Linton, 1994). Indeed, colour has been shown to develop in tonal stories from one season to the next (Perna,1987, Brannon, 2000), as the consumer becomes familiar with the idea of buying into a particular colour range. David Shah, the influential publisher of trend magazine Viewpoint, and the editor of the Pantone Colour Planner forecasting publication explained his approach in The Future Laboratory's 2006 Spring Trend briefing dossier.

'Our understanding of colour is changing. It is evolving as we recognise the power of colour lies not in the simple tonal elements we choose, but in the intelligence required to construct them in new ways. There is nothing new in the palettes we are presenting for summer 07. What is much more important is the way we recognise that these palettes can interconnect, change and mutate by the time they reach their end use.'

(Shah, 2006: 26)

It is a brave move for a colour forecaster to state their colour palettes are' nothing new', particularly during a period of fashion consumption which has seen the rise in the instant global dissemination of trends via the internet and the increased popularity of fast fashion. Upon closer examination however, Shah is not saying anything radically different; colour palettes have always developed from their initial publication some eighteen months or more prior to the season. Such a phenomenon can be clearly seen in the colour update card published by Peclers one year after their definitive seasonal colour trend book is published. Often the 'Colour Confirmation Card' from Peclers, features very different colours to the original publication, colours grouped in different patterns, or simply new colours added as accents or highlights to alter the initial palette slightly. This may be seen in Figure 8.1, a comparison of the original Peclers colour book for Autumn/Winter 2006/07, and the subsequent colour confirmation card published later in the year, usually six months following the original book. The colour confirmation card is at the top of the image,

with the original colour prediction from the main publication below it. Only 60% of colours from the original palette remain in the updated colour card.

It is evident from Figure 8.1 that the colours have been substantially edited; from the original 42 colours, only 25 were subsequently shown in the colour confirmation card. Most of the bright hues have gone, as have many pastels; the emphasis is very much on the darker shades.

Figure 8-1: Comparison of Peclers A/W 2006/07 colour book and confirmation card

Browns and blackened shades dominate the updated palette, whereas in the original colour prediction, the overall impression was of a strong, colourful palette, balanced between pastels with brighter colours, and the darks. This is not an isolated case; the colour confirmation cards from Peclers studied between Sumer 1999 to Autumn/Winter 2009/10 all showed marked differences between the original published colour trend books and the updated colour confirmation cards. These can be used to improve accuracy closer to the season, as more indicators as to the most popular trends emerge. They are also useful for those working closer to the season to ensure their colour choices are more accurate.

Peclers is not alone in this; other forecasters also show very different colours nearer to the season, and often colour consultants work much more closely to the season in developing

their colours for clients. Janet Holbrook, UK agent for Peclers corroborated this during an interview in 2006.

'We update all the time. With each 6 week drop coming in we are still able to give updates of new ideas and colours coming through. Once we have the designer collections in it's all about adjustment in developing a colour palette nowadays.'

Holbrook (2006)

Holbrook's' view is supported by Jackie Nash, publisher of The Mix colour forecasting books, who decided to stop publishing fashion colour books in late 2006.

'There is a very quick product and ideas turnover, and it is just not viable anymore to provide colour forecasting in the traditional way as fast fashion has taken over and trends are no longer seasonal.'

Nash (2006)

The two retailers involved in the longitudinal studies outlined in Chapter 7, featured colour development cycles of between 23 and 20 weeks for the majority of their product lines and brands, although both used last minute influences to add to their colour stories. Invariably, when working closer to the season, more recent influences will be adopted and differentiate colour trend developments from those compiled by the forecasters eighteen months previously. Such updates raise the question why should early colour palettes be developed if they are only to be subsequently changed? The answer lies within Fig. 3.4, Gaskill's model of design development processes (1992), which shows colour at the heart of the development process, and trend analysis feeding into the Chemical and Technical Research and Development processes, as well as the yarn production. These areas of the textile industry require very early colour information to develop their products, so yarns and fabrics are available when required for design development and later production without interrupting or delaying the designers and retailers critical path.

Some designers would never admit to using trend forecasting to aid their product or design development, or using trend agencies, especially at the higher end of the market, preferring instead to develop their own concepts. Karl Lagerfeld at Chanel insists on always using a shade of pink within the Chanel collections, whatever the season, primarily because it is his favourite colour, and it is now synonymous with Chanel, according to Marie-Christine Viannay, who supplies Chanel with luxury yarns, from an interview with the author in 2007. British Designer Matthew Williamson admits to using trend forecaster's information.

'I do go to agencies, but then I will go in the opposite direction. It is my job to be creative.'

Freeman (2002)

The view is supported in the same article by Matthew Jeatt from Promostyl.

'(Alexander) McQueen would never be seen talking to me because designers like him value their independence.'

Freeman (2002)

Sherril & Karmel (2002) also subscribe to this, citing US forecaster David Wolfe's Doneger group as working with designer labels, although the designers would never admit to buying information from the trend agency. This supports the earlier findings that high end fashion, those that are seen to set the trends, prefer to develop their own colour palettes than rely on commercially produced palettes for direction. Such an independent approach allows designers to change trends and colours at their own pace, whilst concurrently developing a signature colour style. Williamson is renowned for his signature use of bright, vivid colours in a variety of multicoloured prints and embroideries; McQueen is better known for a more subdued and moody palette, darker colours punctuated by occasional brights, as seen in his Spring/Summer 2008 collection.

Figure 8-2: Alexander McQueen Spring Summer 2008 collection (source vogue.co.uk)

8.3 Understanding Colour Cycles

Whilst some designers and specific brands may be renowned for their colour recognisable palettes, much of the high street thrives on change and follows an established process of colour, fabric and garment development for each new range (Tyler et al, 2006). Inevitably some colour repetitions will occur, but there have been few attempts to analyse colour cycles, or their duration. The following section will investigate the work which has been carried out to date in the field, and establish its robustness. If compelling evidence can be found of reliable colour cycles then accuracy of forecasts could be improved further by

applying data from the cycles. This will also be explored further in Chapter 9 by examining two colour forecasting archives.

The main champion of the theory of repeating colour cycles in fashion is Brannon (2000), although others have also commented on it such as Oberascher in Linton (1994), whilst the notion that colours develop cyclically was refuted by Stansfield and Whitfield (2004) in their study of interior colours throughout the Twentieth Century.

8.3.1 Brannon's Colour Cycle Model

Some research has been carried out into the cyclical nature of colour, with Brannon (2000) citing a period between 1860 and 1990 when there were four distinct colour cycles each lasting between 15 to 25 years. However, examining more recent cyclical changes, Brannon's colour cycle diagram (Fig 8.3) documented colour from 1972 to 1992, and used colour cycles that were far shorter, just three to four years in duration, and not subject to fast fashion developments.

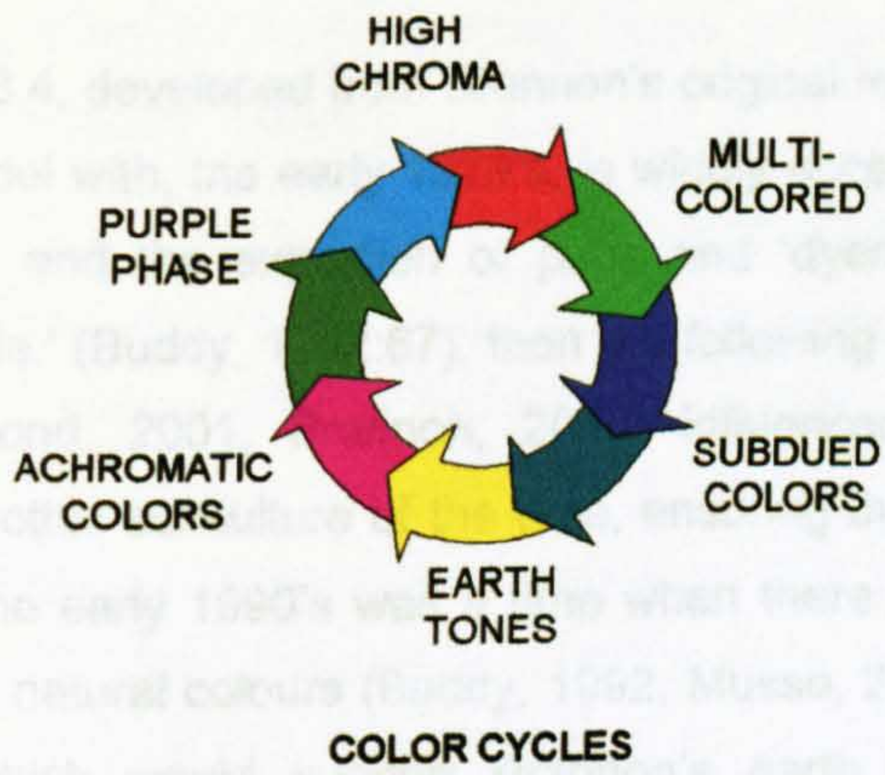


Figure 8-3: Colour Cycles, Brannon (2000)

The repetition of colour cycles in the period Brannon's model illustrates spans thirty years, but much of the time frame used covered a period when traditionally there were only two fashion seasons each year, lasting longer then current seasons. As discovered earlier, seasons now are shorter, there are more seasons within a year, and up to six phases each season, resulting in further pressure on the forecasters and supply chains to respond rapidly (Tyler et al, 2006, Kim & Johnson, 2010, Birtwistle et al, 2003). Eighteen years after Brannon's documentation concluded, in 2010, can those colour cycles still be rigidly applied?

A brief examination of the key colour themes of the decades neither fully supports nor completely eliminates the validity of the model. As with fashion trends, if one accepts

Brannon's basic model, that colour trends appear to be cyclical, it is accepted that colours do come in and out of fashion and can represent a specific mood of a decade.

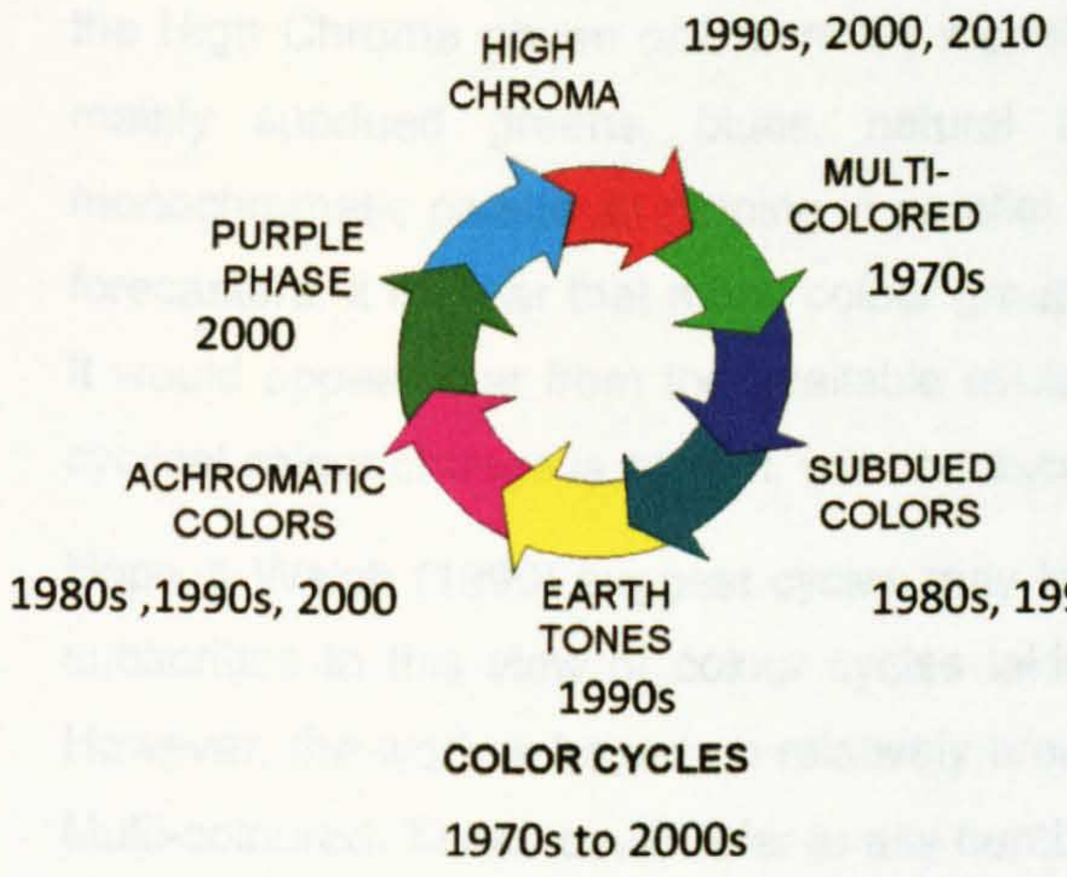


Figure 8-4 Brannon's model annotated with colours from 1970s to 2000s (source: the author)

For example, in Fig 8.4, developed from Brannon's original model, if the first phase Brannon commenced the model with, the early 1970's, is widely accepted as being a multi-coloured era, with glam rock and the explosion of punk and 'dyers' headaches with all colours possible and probable.' (Buddy, 1992:67), then the following black phase for the 1980s and early 1990s (Raymond, 2001, Brannon, 2000) influenced by the influx of Japanese designers and the Gothic subculture of the time, ensuring the timeline started at the top of Brannon's model. The early 1990's was a time when there was more of a return to hand crafted products and natural colours (Buddy, 1992, Musso, 2008), linked to concerns about the environment, which would support Brannon's earth tones section, supported by Jackson's observations.

'The early 1990s saw many consecutive seasons of neutral tones in womenswear, with an explosion of bright and pastel colours occurring in the mid 1990s.'

Jackson (2004:124)

The Y2K or Millennium Bug saw a profusion of futuristic white, metallics and optimistic yellows, only to be later overshadowed by the terrorist actions of 9-11 in New York in 2001, where almost 4000 people died as a result of two passenger aircraft being hijacked and flown into The World Trade Centre Towers; such actions precipitated some very dark colours in fashion, and soon after a purer white (Rinallo & Golfetto, 2006).

'Because of 9-11 designers were anxious to erase the negativity and fear... now black just looks too depressing and sinister.'

Guerin (2005:191)

Perhaps this was Brannon's predicted achromatic phase? Would purple be the next important colour trend? Crispell (1997) suggested there was also a strong move toward purples at this time, consequently changing Brannon's sequence of colour phases. However, Edelkoort suggested in 2008 there was 'a surge of brights' which would align with the High Chroma phase of Brannon's model. At the same time the BTCG were predicting mainly subdued greens, blues, natural and wood tones, lilacs and pinks, and a monochromatic palette all running in parallel. With so many colour options presented by the forecasters, it is clear that many colour groups identified in Brannon's model run in parallel. It would appear that from the available evidence some of Brannon's information regarding cyclical colour change is correct, with the exception of the placement of a purple phase..

Hope & Walch (1990) suggest cycles may last up to a decade each time. Brannon (2000) subscribes to this view of colour cycles taking a decade to truly phase in and out again. However, the work is based on relatively broad groups of colours, such as High Chroma or Multi-coloured. These could refer to any number of colours or combination of colour families, and as such has its accuracy must be questioned. Only the purple phase specifically refers to a colour, or range of colours. Although at first glance Brannon may appear to have produced a strong case for colour cycles, closer analysis reveals very little information regarding colour groups themselves.

In Harold Linton's Colour Forecasting (1994), Lamb suggested that colour cycles had an approximate time span of only five years, half that of Hope & Walch's suggestion yet in the same publication Leonard Oberascher in his chapter entitled 'Cyclical Recurrence of Collective Colour Preferences' identified specific colours which featured in regular colour cycles. From his research, Oberascher suggested that purple was popular every seven years. Brannon also cited Oberascher and the work of Barry (1999) whose research indicated cycles of between 3-4 years duration. Primary research conducted for the study suggests some colour specialists believe that this may closer to the real picture today, and is perhaps only six or seven years between cycles (Hibbert, 2008), and reducing each year. In 1992 Buddy suggested the cycle was even shorter.

'Back in the 1950s it used to take seven years for colour to start at the top level and peter out at mail order. Now it takes only two to three years for colours to saturate the market.'

(Buddy, 1992:68)

Stansfield and Whitfield (2005) carried out research in to whether colour trends reflect the prevailing socio-cultural lifestyle conditions of a society and what cycles could be identified, if any. Although the research focused on interior colours from Australia in the 20th Century, the principles applied were similar to those used by Hope & Walch and Brannon. Unfortunately they found no obvious pattern other than a clear economic boom associated with a growth in disposable income after the Second World War. A greater variation in

colour during the second half of the century was also found, but attributed to the increase in consumerism and new technology.

With so many conflicting views, who is right? Do cycles repeat every ten, seven, five, three or two years, is the lifecycle of a colour key in determining the cycles of colour today, or has fast fashion negated the value of such models? In a sense all the commentators are correct in their considerations of colour lifecycles. In a period of fast fashion, where some colours are developed to respond to a product being in store within six to ten weeks of concept, it is questionable whether or not a colour trend could still last a full decade. It is commonly acknowledged that fashion is fuelled by constant change in order to stimulate sales and interest for the consumer. Inevitably, there will be a multiplicity of trends available at any one time, and each fashion trend, or look, naturally develops its own colour identity, resulting in numerous colour stories being available during any one season. This is further complicated, as retailers divide their traditional seasons into phases, such as 'Party' or 'Christmas', and each phase may have a number of drops within it. Colours do not remain static; they gradually morph over the season as in Fig 8.10, so an early autumn delivery of merchandise may feature quite different colours to the pre-Christmas party delivery, having changed incrementally with each range of merchandise. Some colours may have a longer lifecycle than others, developing a slightly different look each phase or season, perhaps darker, brighter, paler or fluorescent. These can be described best as 'long term fashion colours', and will be explained in more details in the chapter. Conversely, those colours with a very short lifecycle can be defined as 'short term fashion colours', moving quickly from their introduction to removal from the fashion palette. Further analysis regarding the model will be forthcoming from the analysis of the Promostyl and other archives in Chapter 9.

8.3.2 Core or Long Term Basic Colours

Basic or core colours are the staples of any forecaster or retailers colour palettes. They are the colours guaranteed to sell whatever the weather, season or style. They are classic colours often referred to in conjunction with classic styles, such as the 'little black dress', the 'perfect white t-shirt or shirt', 'classic camel coat, or 'navy blazer'. The core colours are the staples, the building blocks upon which the more fashion led colours often rest. They comprise black, white, cream, navy, camel, greys, and a range of other neutrals in beige and grey shades (Linton, 1994). Joanna Bowring, former head colourist for womenswear at Marks and Spencer, revealed in an interview:

'In M&S t-shirts for women, it was always essential to have a pale pink and a pale blue, plus white, black and red, though a shade of red or pale pink might change a bit.'

(Bowring,2008)

Long term basic colours are therefore seen as unlikely to change, and can be used to define a signature style or even a fabric pattern, as in the case of the classic Burberry check. The

British brand has had a renaissance under the design directorship of Christopher Bailey, who has made the classic brand fashionable once again.

The Burberry check, black, white and red on a beige background was first used as a lining for the Burberry raincoats in the 1920's but not patented until 1967. It has survived the test of time, and although it has been reworked in a variety of colours, the basic classic check remains an iconic and easily recognisable symbol of the brand. Ironically, the classic check employs mainly basic or core colours in its design, which may have contributed to its longevity in some way.

Other brands work in a very limited basic palette season after season, such as British brand Sykes, whose Autumn/Winter 2008 collection has been produced in a very limited palette of black, grey, cream, nude and antique gold; classic core colour staples (Britten 2008). Although Top Shop may seem incongruous when discussing long term basic colours, an interview with their Senior Print Designer, Amelie Roberts, revealed they use black, white and navy year on year, although they are not restricted in their colour palette selections, nor do they have specific signature colours. The group is simply colours which sell well each season. Diane & Cassidy (2005) also refer to these colours as 'staples', and include dark blues, greens, browns and greys, beige, black and white in the group. Sian Edwards from Marks & Spencer refers to these colours being used season after season in basic garments such as t-shirts, linen trousers and shirts.

8.3.3 Long Term Fashion Colours

Long term fashion colours may be defined as those colours which transcend several seasons in one form or another. They could be a particular group of colours, deep reds for example, or individual colours which are specifically repeated each season, which are not a member of the core colour family. A clear example of this, discovered from the comparison of published colour palettes, is petrol blue, which featured in the Peclers colour books between the Spring/Summer 2005 and Spring/Summer 2007 seasons. The colour did not develop or progress in any discernible manner, sometimes slightly brighter, sometimes slightly darker, and simply remaining as an accent which worked alongside a number of different colour combinations, transcending the seasons. This can be seen in Fig. 8.5, where the blue is highlighted in each palette.

Figure 8-5: Peclers colour palettes Spring Summer 2005 – Autumn/Winter 2006/07, petrol blue highlighted in each palette

Some colours, such as the petrol blue illustrated, help to complement or contrast existing colours in a palette to bring more modernity; in the first Peclers palette to contain petrol blue, Spring/Summer 2005, there were no other shades of blue visible. This is unusual, as blue is often seen as a staple colour, used by many retailers as part of their core colour range. However, in the period studied, Peclers did not present many clear blues, with the majority having a green or grey cast.

Marie-Christine Viannay, who works with clients such as Louis Vuitton, Hermes and Chanel, has her own view on the long term fashion colour.

'A colour can be right for two to three years and have a slow burn lifecycle; later it can become a basic colour.... Colour cycles are more fluid and last longer than the retailers would have us believe.'

Viannay (2007)

8.3.4 Short Term Fashion Colours

From the research conducted, it appears that short term fashion colours fall in to two distinct categories: those which have been predicted in advance and those which are used as a supplement to existing colour developments.

Retailer A referred to 'iconic' or 'fashion' colours during their colour development processes, whilst Retailer B referred to 'totally new' colours. Such colours are developed each season to enliven the colour palettes and provide freshness to the retail merchandise. In summer 2008, there were a myriad of bright colours available on the high street, developed into floral print stories or strongly colour blocked. The colourful trend continued into the Autumn/Winter season with the addition of new bright shades. These punctuated the alternative major Autumn/Winter colour story, blackened colours; the ranges available were not as obvious in summer, other than some grey shades and the core basics in black. The predictions from Peclers for the following Spring/Summer 2009 were for cleaner and brighter colours with less green than previously, a focus on coral pinks and yellows, sherbet colours, honeyed or blonde wood tones. Such colours may develop as a result of being introduced in the designer catwalk collections, or popularised by a celebrity or event; unfortunately, if they do not sell well they will be unlikely to be repeated.

Charles Smith, the 2005 President of the Colour Marketing Group (CMG) in America supported the view in Brannon (2000):

'Colour sells...and the right colours sell better...if it's the wrong colour, it's inventory.'

(Brannon, 2000:187)

It would appear from the research available, and that conducted by the author for the investigation, there are no guarantees whether or not a colour will be a commercial success. Congruent with Smith's view, retailers may experience weak sales in specific colours if the consumers are not attracted to it, resulting in markdowns and unsold stock. Therefore, it is of vital importance the retailers get it right but the evidence presented in this chapter indicates that success is based on a number of factors. Core colours are perennial bestsellers, and comprise the staples of any colour trend prediction. Colours sometimes take several seasons to fully develop and become mainstream, as with fashion trends, and they can also last numerous seasons as they are lightened, darkened, pearlised, metallicised or matched with colours which affect their appearance in some way. Retailers and brands need to know their customer better, through focus groups, sales monitoring or other means. Investing in forecasting may be the answer for some, but it appears from the interview series conducted, that not all brands use forecasting services Amelie Roberts at TopShop vowed never to look at forecasting materials, preferring instead to develop her own colour concepts, Glenda Handsford, a buyer at Next had the same view when interviewed for the research; she would never subscribe to forecasting publications or websites when developing colour and trends. However, Sinha (2002) cites one salutary

example regarding accurate trend development and sales performance. In 2002 inappropriate or dull designs were blamed at UK retailers Marks and Spencer and Laura Ashley for a lack of sales. The William Baird Group's brands, Windsmoor, Planet and Precis Petite were also highlighted for poor sales figures which were attributed to the inability to spot and translate current trends in both styling and colour into merchandise.

It would be wrong to say that any one colour remains the same season after season, other than the basic core colours. Undoubtedly colour groups do develop momentum, purple phases, as identified by Brannon (2000), is one clear example. Consumers also express preferences for particular colours year on year, such as blue, or their preferences reflect the culture in which generations come of age (Paul, 2002). In the US men traditionally preferred dark, rich neutral colours in comparison with their European counterparts, who chose brighter, more complex colours (Paul, 2002). In the following chapter, a deeper analysis of colour cycles will be presented, focusing on specific colour groups, rather than Brannon's more generic cyclical model.

8.3.5 Reviewing Cyclical Colour Combinations

Undoubtedly some colour combinations are used repeatedly, with a slightly different emphasis on some highlight or complementary colours, or different fabrications, resulting in a variety of surface treatments which may change or distort the colours slightly. Interviewed in 1993, Denise Ford, then the Design Manager for DuPont (UK) Ltd, explained that she had experienced colour cycles previously, so it helped in the development of new colour predictions.

'Her many years of experience in the textile industry... not only give her a historical perspective – knowing how cycles have evolved in the past may give clues to how they will evolve in the future – but also ensure she can confidently rely on her 'gut feelings' about trends.'

(Foster, 1993:4)

This also supports Fig 6.7 and the notion that expert intuition, coupled with gut and strategic intuition can help experienced forecasters develop 'new' palettes.

In order to test the theory, an example of the combination of brown, yellow and orange tones with navy blue was selected.

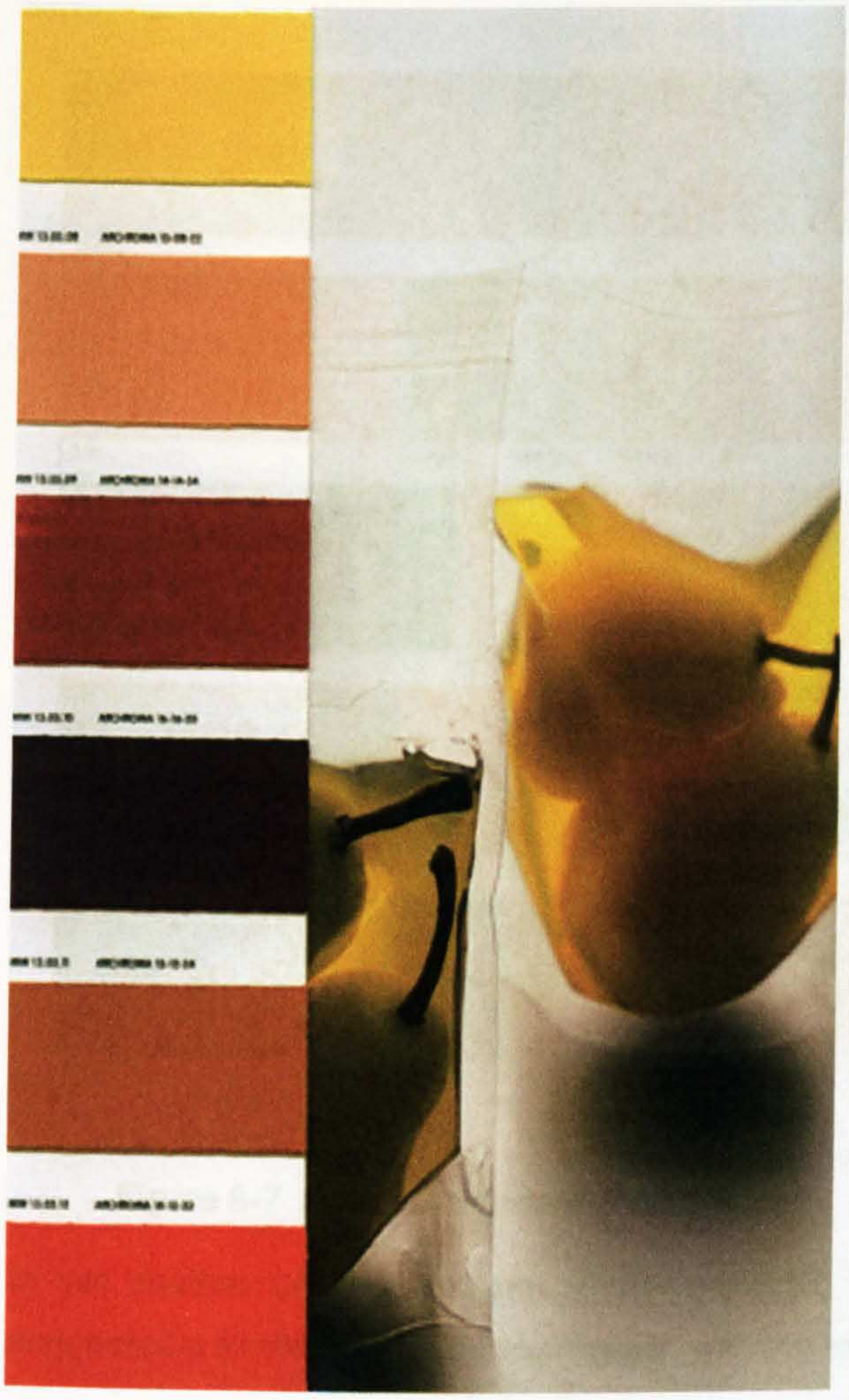


Figure 8-6: The Mix Natural colour palette, Autumn Winter 07/08

As can be seen in Figure 8.6, The Mix Autumn/Winter 2007/08 trend book featured a palette named Naturals. It had a strong emphasis on rich brown, yellow and orange tones, described in the publication as 'This delicious group offers gold without the glitter – honey, syrup and tan – and is rounded off with red hot poker orange.' A similar palette was show by Peclers for their Autumn/Winter 2002/03 range, seen in Figure 8.7. The colour similarities are quite striking as the palette features similar shades of honey, syrup, tan, and the red hot poker orange indicated by The Mix, several years later. The combination is by no means a new or unique one, and all the colours work well together. Another similar colour palette was in existence far earlier in the late 1960s and early 1970s, when there was a strong feeling for browns and orange tones in fashion and interiors (Stansfield & Whitfield, 2005), and 'autumnal colours in a brown phase (e.g. 1976-79)' Brannon (2000:130).

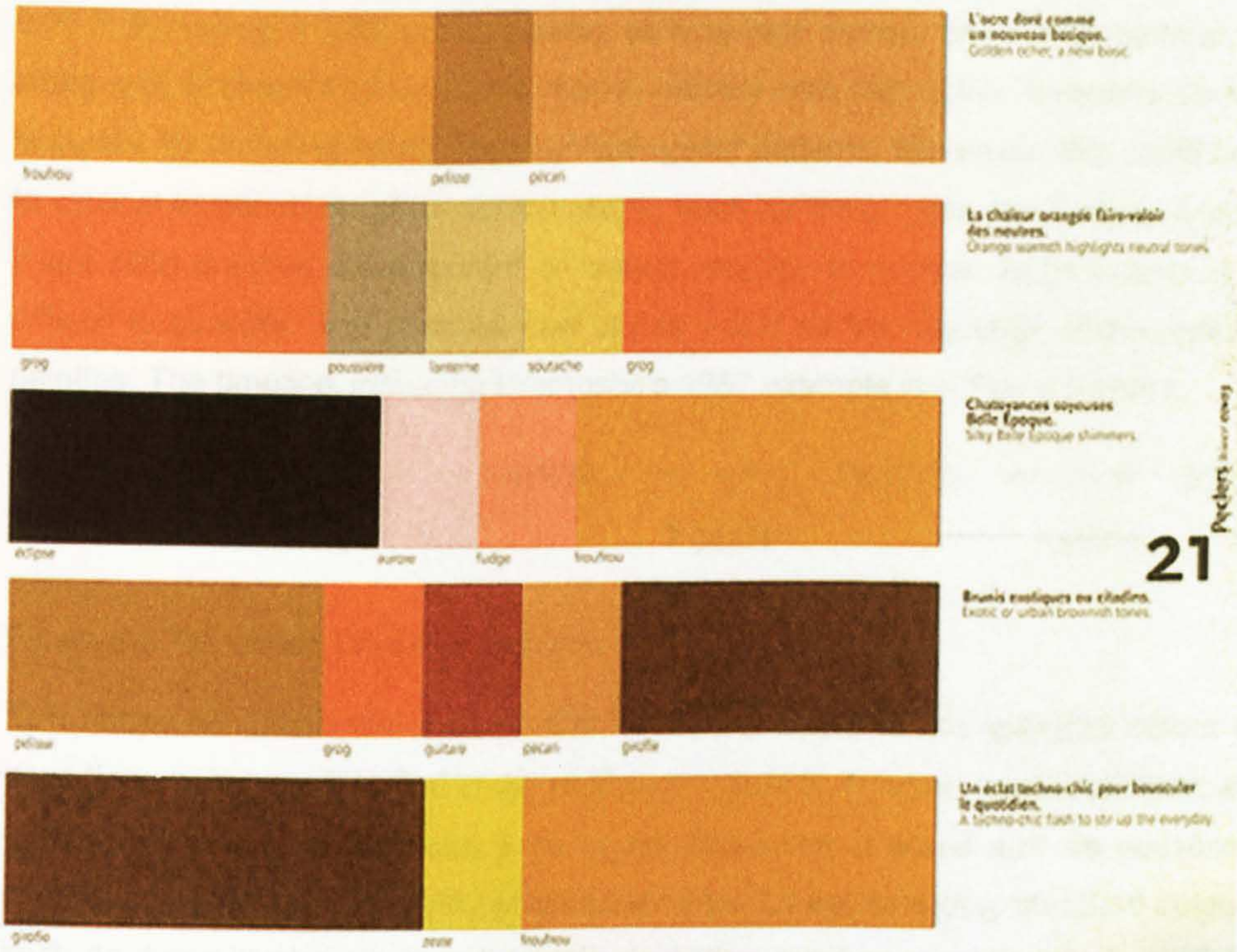


Figure 8-7: Peclers Autumn Winter 2002/03

In yet another decade, Autumn Winter 1995/96, British forecasters Design Intelligence suggested a similar palette for menswear, with the inclusion of a lighter, more indigo blue.

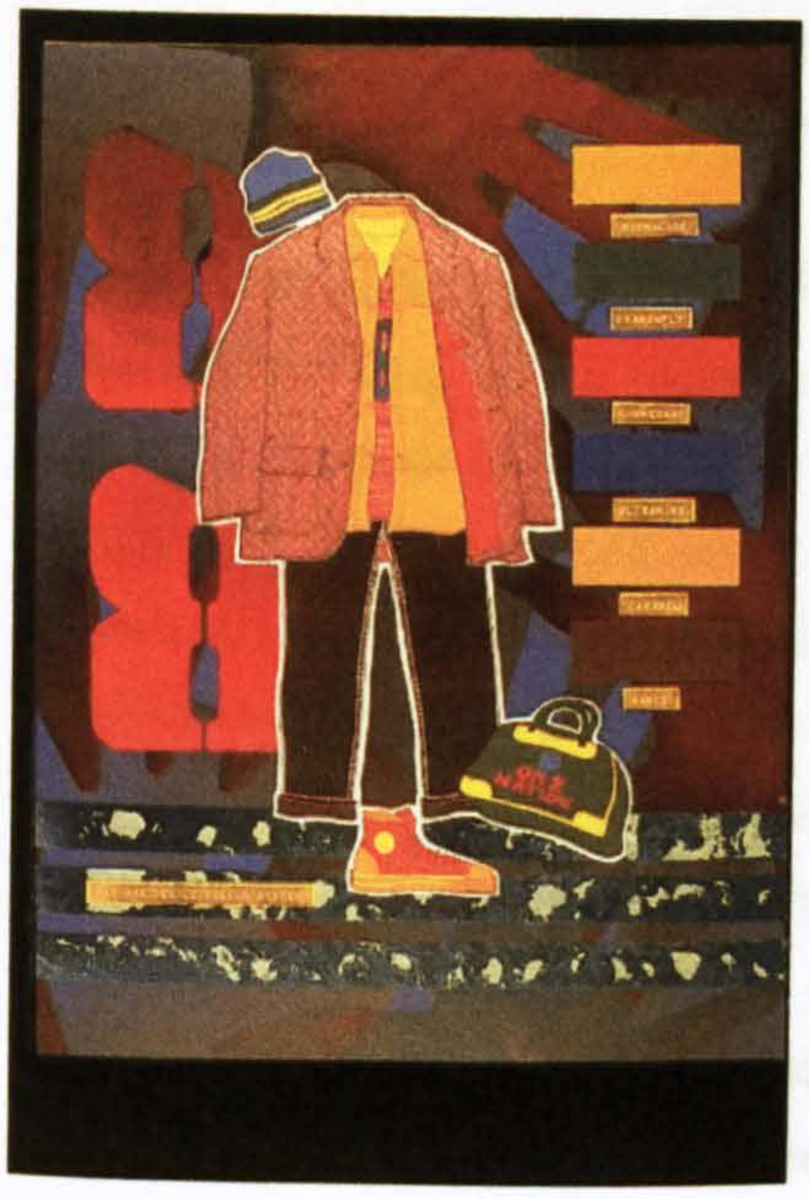


Figure. 8-8. Design Intelligence Menswear, Autumn Winter 1995/96

Clearly, this is a colour combination which has repeatedly proved popular, recurring in Fig. 9.27 in Promostyl's 1987 colour palette, so may help answer one of the research questions, along with Brannon's colour cycle model, namely how can colour forecasts be made more accurate, by following established cyclical colour patterns. Moreover, this could be extended to cyclical established colour combinations, such as the browns and yellows cited. How this might stifle creative development or instant reaction to sudden world events in fashion is difficult to quantify. The potential flaw in this would be the regularity of the repeated colour palettes. The timeline, including Promostyl's 1987 example is in Fig. 8.9 below:

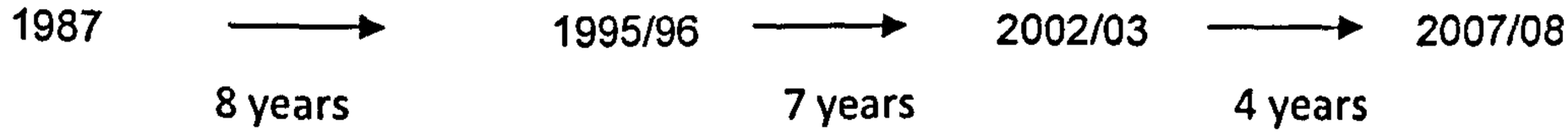


Figure 8-9 Repetition of yellow and browns colour palettes

This shows no discernible pattern, other than perhaps that any potential colour cycles are speeding up, but no data that could usefully be used to establish clear indicators as to when a colour palette could be used once again. Moreover, it would also be possible, if colour cycles were found to be entirely predictable in the future, to supply standard colour palettes, such as those illustrated, at a far lower cost than purchasing new colour predictions each season. Who would decide which colour palettes could be deemed as fashionable is an interesting question, considering the forecasting industry is a multi-billion pound one, based around the ever changing nuances of colour and fashion.

Although this may not provide a complete solution, it would no doubt be cost effective to many users of colour forecasting services to retain their own library of colour palettes used in previous seasons, and repeat them whenever the colours are in fashion again.

8.3.6 Seasonal Changes in Colour Palettes

The decade long colour cycles which Hope & Walch (1994) describe may not be exactly what they appear at first. It would be unthinkable in such a fast paced fashion environment today that any one specific shade would experience popularity and longevity over a decade. However, it is far more conceivable that a feeling of colour, such as greens inspired by the environmental and organic movements of recent years, may well last for a number of years or seasons, developing from being completely fresh looking, through a series of shades into eventual obsolescence. An abridged version of this can be seen in Fig 8.10. New colours are introduced for the season; the colour is well received, perhaps a pale lilac for a Spring/Summer season. The retailers would use this in a variety of shades through the four or five phases comprising their Spring/Summer season. The following season, Autumn/Winter, the lilac could be darkened or greyed slightly to a mauve shade, and would again be used throughout the season by the retailers in a variety of shades. By Spring/Summer the following year the colour may move into a deeper shade, or become

clearer and more vibrant. Eventually the colour becomes uncommercial and obsolete, so is removed from the colour palettes for a period of time. Fig 8.10 shows this compressed in to just three seasons, but the evidence from literature and interviews conducted suggest this may take ten or more seasons to progress, essentially five years or longer, whilst allowing new colours to develop in parallel.

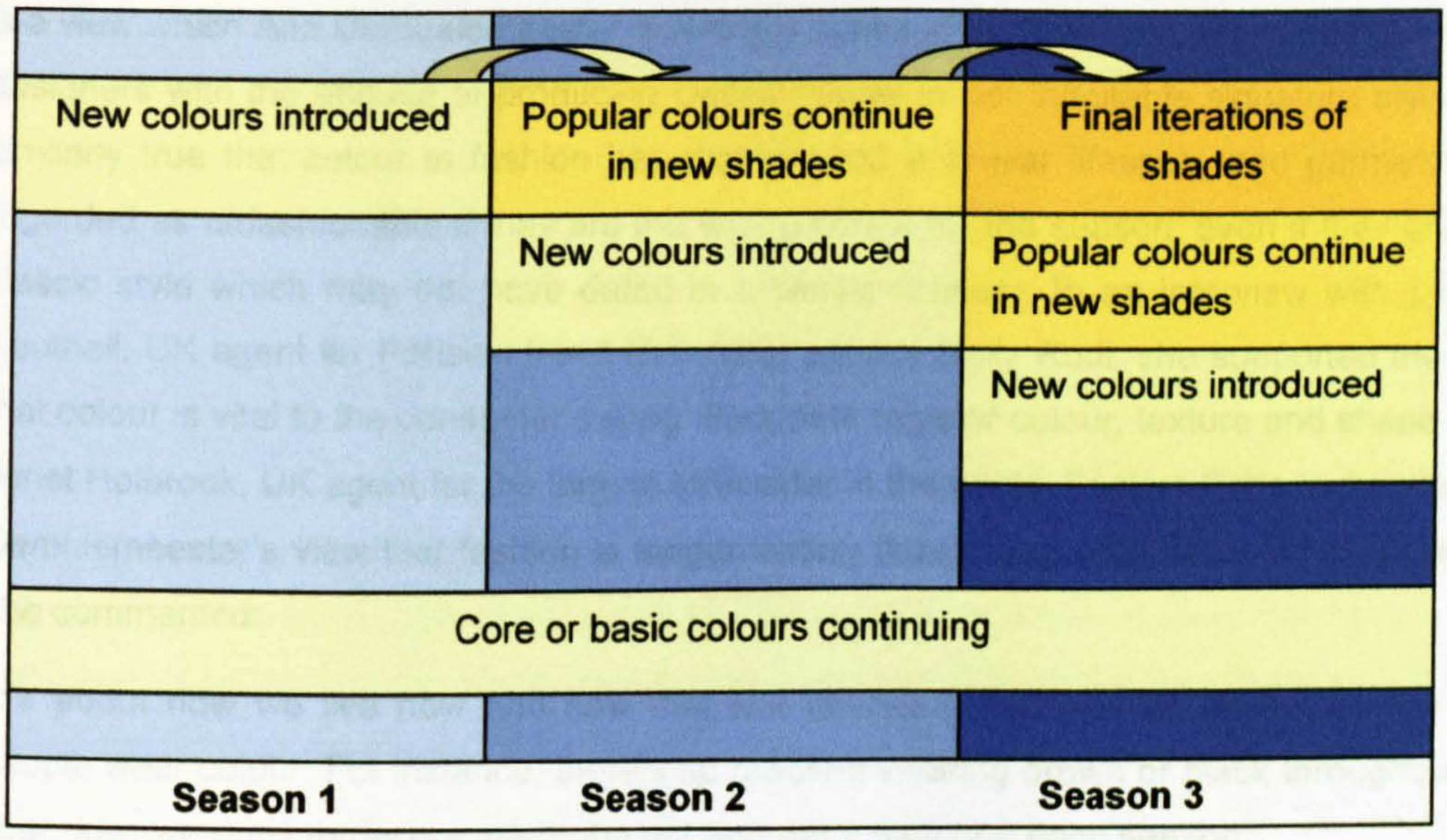


Figure 8-10: Seasonal changes to individual colour trends

From Figure 8.10, and evidence gathered though the research, it appears colour cycles and colour trends may be divided into three basic areas.

- Long term, sustainable basic colours
- Long term fashion colours
- Transient, short term high fashion colours

The more transient, high fashion colours ensure that colour keeps pace with changing fashion styles and their lifespan too, supported by the work of Meyersohn & Katz,(1957:595) .

'Every object has a lifespan: It is one of the characteristics of fashion that replacement is made before the lifespan ends. Such objects are acquired without regard for their durability.'

Belgian designer Ann Demuelemeester has a strong opinion on rapidly changing fashion trends too.

'You don't need to change your wardrobe every few months, but that is what fashion is trying to sell.'

Britten (2008:16)

Despite Meyersohn & Katz's observations being made over fifty years ago, their words are still relevant today, perhaps even more so as clothing has become cheaper in real terms. It is a view which Ann Demuelemeester is strongly opposed to. However, she is one of the few designers with the attitude of producing classic pieces in her inimitable signature style. It is similarly true that colour in fashion has experienced a similar lifespan, and garments are regarded as unfashionable if they are the wrong colour for the season, even if they are in a classic style which may not have dated in a similar manner. In an interview with Lynette Southall, UK agent for Parisian trend forecaster agency Nelly Rodi, she supported the view that colour is vital to the consumer saying 'Shoppers register colour, texture and shape first.' Janet Holbrook, UK agent for the largest forecaster in the world, Peclers Paris, subscribes to Demulemeester's view that fashion is longer lasting than in previous years. In an interview she commented:

'It's about how we live now and how that has changed, that has an impact on the way people wear colour. For instance, there's no problem wearing brown or black throughout the year now, we don't throw our wardrobe out and get a new one each season.'

Holbrook (2006)

8.4 Summary

Evidence in the chapter has illustrated a number of inherent difficulties in establishing a single model of rate of change in colour cycles, or in the identification of cycles by colour groups, as in Fig. 8.9. The rate of change in colour trends is perhaps one of the most contentious aspects, with a variety of industry professionals and academics proposing a wide range of possible time spans, from ten years to just two. Further compounding the issue is the rate of change in fashion trends and garment production since the earliest commentaries in the 1970s.

That the fashion retail environment has changed dramatically in the last 40 years is not in doubt: retailers have introduced more seasons, more phases within seasons, and thus increasingly rapid product turnover. Large amounts of merchandise is being bought increasingly closer to the season as fast fashion dominates many brands today. It is inevitable that colours will change more rapidly than they did previously, as fashion trends change more rapidly too, As discussed, Brannon's colour cycle model has much to commend it, and there were some clear correlations between her predicted colour cycles and past colour trends up until 2000, when diverse colour predictions were being made, resulting in no one single or identifiable dominant colour group. The evidence indicates the

reason for this is once again the wide variety of products now available at any given time and demands for constant change driven by more rapid wifi communications systems. Further research of colour forecasting archives in Chapter 9 will help to provide additional information to analyse the accuracy of Brannon's colour cycles model.

Evidence was presented identifying that certain colour combinations are repeated and therefore could potentially be used in conjunction with a model such as Brannon's to predict specific colour combinations and colour palettes for any given decade. However, there were no clear guidelines as to when colour cycles might recur; indeed, it would appear that the pace of colour cycles has increased in recent years, and that it is possible for amny colour trends to prevail at any given time. As Easey (2009:5) comments:

'In order for the change which is intrinsic to fashion to take place, the industry must continually create new products.'

This suggests that newness is the key to fashion and predictability would not be appropriate. Coupled with this multiplicity of styles are the concepts that fashion colours can have long or short term impact, sometimes developing through various nuances and combinations with new colours, thus lasting several years or more as fashion colours, or simply being a key fashion colour for one or two seasons and then becoming obsolete. In summary, the evidence illustrates that colours may last an indefinite period of time which is often governed by their adaptability and popularity with the consumer in terms of sales and revenue. Some colour combinations are regularly reintroduced, in particular if they have been popular and well received with the consumer.

The answer to the research question posed regarding whether or not colour can be accurate if compiled over two years in advance seems to lie not with cyclical colour palettes, but instead with the continued reference to seasonal changes in colour trends, where fashion colours can take several seasons to completely phase out, changing slightly each season. The forecasters seem to acknowledge this as they publish in-season updates, allowing considerable modifications to be made to their original predictions nearer to the season. By adopting a more systematic and incremental approach to seasonal change, the forecasters may be able to develop more accurate initial colour palettes, requiring less subsequent modification nearer to the predicted season.

When colours take longer to phase in and out they can be easily categorised as being in phases, perhaps as long as a decade, as Hope and Walch (1990) suggested. With the pace of change in today's fashion, the evidence indicates that a true colour phase can no longer take such a period of time to evolve, but that it is far faster, and there are multiple colour phases running in parallel at any given time. Such changes in colour trends are always supported by the core colours within a palette, or retailers range, the main core colours identified previously as white, cream, black, grey, navy and camel. Chapter 9 will provide

further evidence to inform the research questions and establish finally if a repetitive colour cycle can indeed be predicted, to simplify the process of colour forecasting and improve accuracy.

9 Examination of Colour Trend Archives

'The notion that colour is bound up with the fate of Western culture sounds odd and not very likely. But this is what I want to argue: that colour has been the object of extreme prejudice in Western culture.'

Batchelor (2000:22)

9.1 Introduction

Two archives were studied, comprising different forecasted publications. The first was the examination of Promostyl archives from London College of Fashion comprising a twenty year span of Promostyl trend books from 1985. At De Montfort University Peclers and Nelly Rodi publications were compared, spanning five years. Additional information regarding Peclers supplemented the survey resulting in a group of trend books from Peclers from Summer 1999 to Autumn/Winter 2009/10.

The data gathered contributed to two research questions:

- Can colour forecasting be accurate if compiled over 2 years in advance.
- Can forecasts be made more accurate, e.g. by following established cyclical colour patterns.

Predicted colours will be compared with popular fashions of the time and other colour evidence from literature available. Documenting the Promostyl archive helped challenge Brannon's colour cycle model (Fig. 8.4) and supplement colour cycle information discussed in Chapter 8.

9.2 Categorisation of Colours

The categorisation began with the Promostyl colour groups. For the purposes of the research, a colour in a palette was only counted once. If a colour was obviously neither one hue nor another, i.e. a greenish blue, a categorisation was made based on the dominant colour visible. Obviously such judgments carry profound risks, as individuals each view colour differently, but the author applied the same judgment in each case to identify and 'count' the number of colours within the colour palettes and their frequency of appearance. Long and Luke (2001) acknowledge that individuals have different colour perceptions due to the amount of pigment in each individual eye. Furthermore, they suggested three rules be followed when making colour judgments by eye.

- The light source should always be the same.
- The angle of the light should be consistent

- The background colour should be a neutral grey or consistent throughout

As far as possible, Long and Luke's guidelines were adhered to; however, due to the period of time taken to analyse the entire archive and variables in the weather conditions, and therefore light each day, it is recognised that light may not have been an entirely consistent factor, although the remaining two conditions were.

9.2.1 Promostyl

Promostyl are described as 'centering on lifestyle trends' (McKelvey & Munslow, 2008), and have been forecasting for over 40 years, working on a one to one basis with their clients as well as publishing generic trend books.

'Their methodology is to understand a client's requests by studying the changing lifestyles and cultures belonging to the client's market.'

(Guerin, 2005:24)

The archive at London College of Fashion, donated by Promostyl, spanned thirty eight seasons from Summer 1985 through to Autumn/Winter 2006/07. There were two books missing for the seasons Summer 2004 and Autumn/Winter 2004/05. The women's trend book was available for 04/05 and illustrated some colour directions but not the overall colour palette groupings. However, there is nothing for summer 2004 to make a comparison between the seasons, thus it was discounted from the analysis. The initial intention was to examine only Womenswear, but due to the changing nature of the published formats throughout the archive, it was deemed more accurate to examine generic colours, as they appeared in the colour palettes.

Figure 9-1: Sample of Promostyl colour archive at LCF

Initial observations surrounded the wide range of formats adopted over the years by Promostyl as it responded to trends in the market, and industry demands for information. However, the basic grouping of colours was interesting in terms of progression through the seasons and years. Language was also considered, as from Autumn/Winter 2003/04 onwards Japanese text was included in the books. Previously there had been a focus on French and English text only. This reflects changing markets for the company's products; indeed a changing foci for fashion and textile related design in Japan.

9.2.2 Peclers and Nelly Rodi

Peclers are renowned for their colour direction (McKelvey & Munslow, 2008), and so the availability of an archive of their trend books was judged to be invaluable to the research process. Nelly Rodi is described by the same authors as a colour trend agency which specialises publishing trend books aimed at assisting creative teams. The archive was held at De Montfort University in Leicester, and comprised a comprehensive range of publications from the two Paris-based forecasters Peclers Paris and Nelly Rodi. The seasons comprised Summer 2005 to Autumn/Winter 2009/10, although not all seasonal publications were available from either forecaster. It was carried out following the analysis of the Promostyl Archive at London College of Fashion to add a further dimension to the understanding of colour cycles or similarities. Autumn/Winter 2008/09 was omitted as some of the books were missing from the archive; it was therefore deemed best to remove the season completely, rather than use a limited resource which may not have fully represented the seasonal and company nuances

Unfortunately, no earlier publications were available, and as the Promostyl archive ended at Autumn/Winter 2006/07, there was very little overlap, thus a detailed comparative analysis was not possible. Despite its shortcomings it was still deemed a valuable resource to explore further.

9.3 The Promostyl Archive

9.3.1 Evidence of Changes in the Industry

The initial format was a spiral bound book and essentially this continued throughout the archive, although it became markedly more refined as the seasons and years progressed. The first book studied, published in 1983 was somewhat naive in presentation, corresponding with publications considered earlier from the same period, A4 format, and featured four women's colour stories comprising five basic colours each:

- Suffragette - Chic basics, neo-retro
- Gipsy - Passion of intense brights
- Epicurean - Soft lights, pleasure culture

- Moorish - Acid magic, orientalism, voluptuous

Figure 9-2: Promostyl colour palette Summer 1985

The colour palettes and the manner in which they are presented, as shown in Fig. 9.2, are clearly quite different in respect of today's colour forecasting standards, and similar to those of the IM Group from Autumn/Winter 1980/81 illustrated in Fig. 4.1. Analysing the books pragmatically, it could be argued that the fabrics, yarns and fashions of the day were also more basic than contemporary styles and tastes, reflecting Edelkoort's view that contemporary colours are very different to those of previous decades.

'Themes were more predictable and often fell into evolving stories that reflected the slower moving trends of the time.... Colours were more simply divided into neutrals, midtones and darks and brights and less market segmented than today.'

(McKelvey & Munslow, 2008:01)

Such observations are supported by the very limited range of colours presented in Fig 9.2. Three of the four colour groups identified are clearly visible from the Summer 1985 palette;

- Neutrals = Suffragette
- Midtones = Epicurean
- Brights = Moorish

This pattern is especially prevalent in the first three books of the archive, and can be attributed to most of the archive where the basic colour groups are easily identifiable. The major shift in colour occurred in the early to mid 1990's when the number of colours,

finishes and variety increased in the publications, and a period when fabric and garment manufacturing was being moved to lower cost offshore locations. The industry refocused and accurate trend information was more valuable than ever before as working practices changed. Jackie Nash, who worked with one of the earliest dedicated colour forecasting publications, The International Colour Authority, said the company 'was revolutionary for using colour stories or groups when it was first published in the early 1970s, but by the end of the 1980's it was getting tired.' Presenting colour information in groups rapidly became an accepted format, and the overwhelming consensus from the series of interviews with key industry figures indicated that during the 1980's forecasters were perceived as being an accurate trend information source, as such sources were more limited than today. Cogently, this is in part due to the speed at which information and images are transmitted today from designer catwalk shows and trade fairs around the world via the internet, e-mail, mobile telecommunications and the multiplicity of trends. Fashion is considerably more accessible and immediate than ever before for designers and consumers alike and consequently consumers have undoubtedly changed. Interviews with colour experts supported this conclusion as Janet Holbrook, UK agent for French forecasting giant Peclers Paris noted:

'In the old days they (consumers) were prepared to wait a bit until things came into the shops. Now they can see it all immediately on sites like vogue.com and they want copies of the looks right away.'

(Holbrook, 2006)

Denise Ford, who worked with early forecasting innovator Deryck Healey, and latterly as design studio manager for ICI/Du Pont in the early 1980s believes colour predictions began to take off in the 1980s, around the time the archive began, although Promostyl had been presenting trend information since the mid 1970's.

Evidence in previous chapters indicated the early 1980s attracted a substantial number of new players to the industry, more women than men were entering the workforce, requiring separate working and leisure wardrobes, and selling more clothing (Stansfield & Whitfield, 2004). Consequently competition between forecasters intensified, and companies devised new strategies and formats within their publications to both retain and increase market share. Today's' range of companies using trend forecasting information now extends to retailers, manufacturers, suppliers and designers (Brannon, 2000), and Chris Gilbert, Creative Director for New York trend agency the Doneger Group, stated:

'I hope that clients interpret our ideas in a way that stimulates change rather than sticking to the same old, same old.'

(Spear, 2006:23)

Not only has there been a major shift in fashion, communications and retailing since the early Promostyl books were published, increasing consumer demand has led to far greater pressure on the designers and retailers to get trends right, interpreting key catwalk and celebrity looks as quickly as possible.

Each Promostyl colour story in the early publications examined was accompanied by French and English text, a mood board depicting images which supported the theme, and a photograph of garments styled to match the theme and colour palette. There were also paper colour chips which could be taken from the books and a range of coloured yarn wraps. The French and English text reflected the key markets at the time, notably the English and French speaking parts of the world, where much 'fashion' design was centred, Paris, London and New York were key fashion capitals, with Milan important as a part of Europe. The early American trend publication IM Report July 1978 featured a section 'Summer in the Cities', featuring 'the new uniforms on the streets in Paris, London, Milan and New York'. The newer fashion capitals which contemporary designers acknowledge as influential, such as Tokyo and Antwerp, were not featured as their fashion industries had not yet developed sufficiently to warrant inclusion or comment.

Figure 9-3: Suffragette theme from Promostyl Summer 1985

Interestingly, Fig. 9. 3 depicts a group of garments, styled into a complete outfit. Here the initial question regarding accuracy must emerge, although not directly related to colour. Working backward in the trend development cycle, the garments must already have been available in the market some two years prior to the trend being predicted by the story. How can these been seen as directional pieces? One answer could be perhaps that the

garments were at the very beginning of their fashion lifecycle, in the stage of early adoption (Rogers, 1985, Sproles & Burns, 1994, Raymond, 2010) and may not have reached mainstream fashion until the predicted season. By the time of publication, they must surely have been outdated, or at best, transcended to mainstream fashion, so any benefit of their inclusion appears negligible. Whatever the explanation, Promostyl soon omitted photographs of garments in favour of conceptual garment sketches, which remain to the present day in the trend books. It is far easier to conceive new directional silhouettes and garments on the drawing board, than find them in store.

Colour chips and yarn wraps remained a part of the book throughout with additional colour information provided for each theme, an indication how the colours could be worked together in small groups or pairs. This was no doubt intended to help the user develop their colour themes. Promostyl's publications underwent an understandably broad range of style incarnations throughout the archive as design tastes changed.

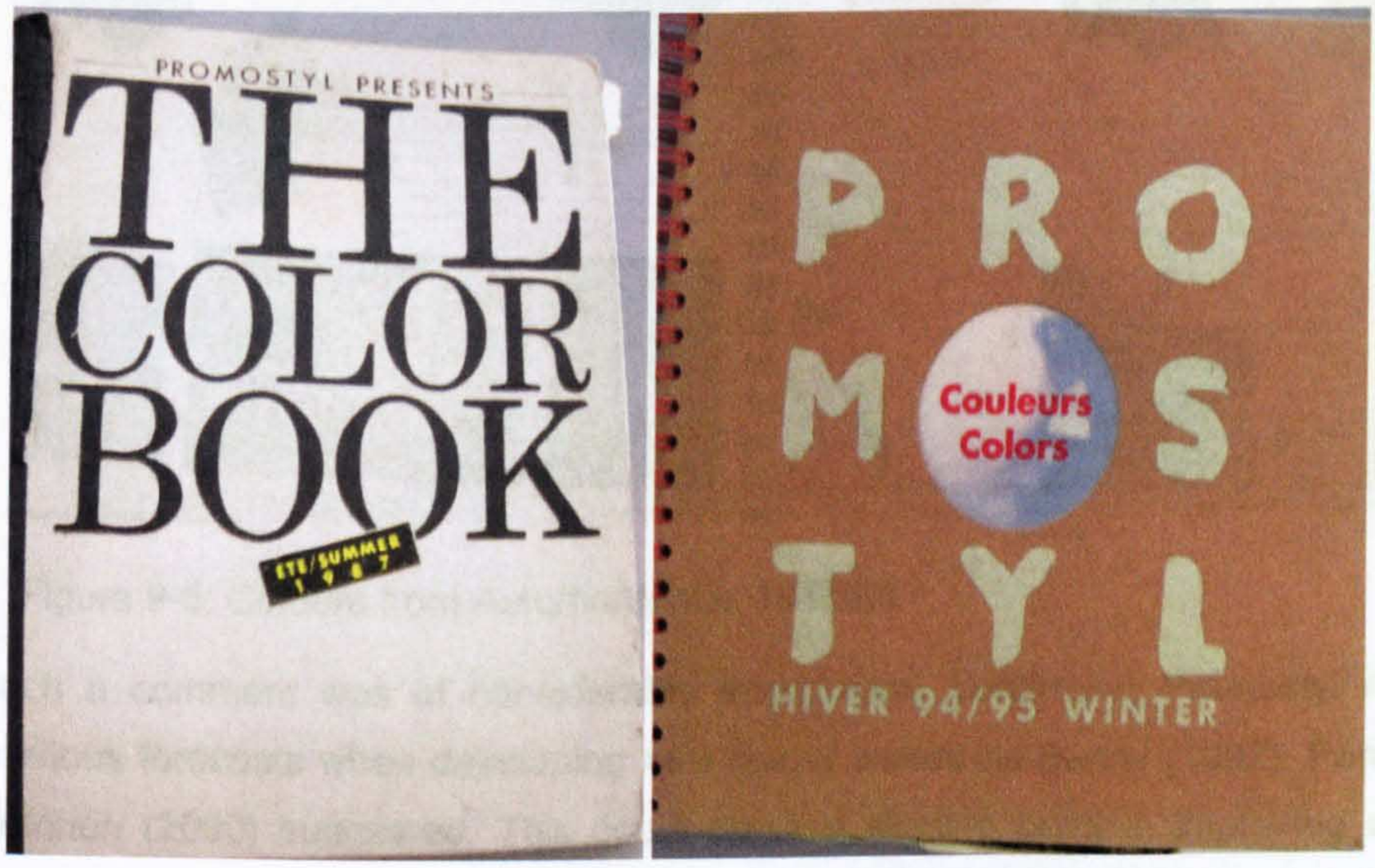


Figure 9-4: Promostyl book formats, Summer 1987 & Autumn/Winter 1994/95

The number of colour stories often varied between four and five each season; indeed it appears to be the standard number of colour palettes for Promostyl and many other forecasting agencies examined during the course of the research, and in this respect adhered broadly to McKelvey & Munslow's theory that there were only ever four main colour groups repeated each season, as previously discussed.

9.4 Colour Cycle Evolution and Analyses from Promostyl Publications

As evidenced throughout the archive, the company had always introduced their colours and discussed the colour groupings to some extent, as in Fig. 9.5 illustrating the main colour groups from Autumn/Winter 1987/88. However, in the Summer 1990 publication, Promostyl referenced the previous seasons colours and their development for the first time. It was a relatively small and insignificant comment at the front of the book stating:

'The summer 89 colours were aged and faded....the summer 90 colours are fresh and crisp.'

Figure 9-5: Colours from Autumn/Winter 1987/88

Such a comment was of considerable importance, confirming Promostyl reflected upon previous forecasts when developing new colour trends as Buddy (1992), Perna (1987) and Brannon (2000) suggested. This could prove a starting point in improving accuracy. The commentary on colour changes subsequently continued through the years and the seasons, becoming increasingly detailed in subsequent publications and commenced an internal analysis of Promostyl's own forecasted colours.

By Autumn/Winter 1994/95 Promostyl were actively comparing colour trends from previous seasons in new publications within a section entitled colour evolution. It featured the previous three Autumn/Winter seasons, from 1992/93 to 1994/95, arranging colours side by side to facilitate the examination of the colour progressions throughout the seasons. In terms of persuading clients their forecasts were accurate, it was a good marketing tool, illustrating how the company's predicted colours developed throughout the seasons, and instilling a sense of confidence in the product for the client. In this respect it supports Fig. 7.10. Seasonal Changes to Individual Colour Trends, where the model shows how popular colours can continue over several seasons in slightly differing shades.

Such a comparative analysis, although limited, provided some insights, and the company continued to use the practice. It is unclear how their customers received it, or indeed how accurate their earlier predicted colour trends had been in relation to commercial success. Further limitations were observed from the archive; the colour progression examined major colour groups, rather than the more generic colour stories, which often incorporate a wide range of diverse colours. It was therefore ambiguous and cannot be viewed as a key information source for the accuracy of predicted colour trends or cyclical repetition.

Figure 9-6: First comparisons of colour progression, Autumn/Winter 1994/95

Promostyl identified five basic colour groups which had progressed through the winter seasons and illustrated their evolution in terms of changing shades or additional colours intended to change the look or feel of the group.

The first group was naturals, which slowly became whiter as the seasons progressed, and can be seen developing in Fig. 9.6 with the earliest season on the left, through to the most current on the right. The relationships between the three seasonal red palettes is somewhat questionable, with blues and greens perhaps the least convincing of the colour groups. The blues in the first season are very dark, but by the 1994/95 season bear little relation to the first palette; indeed Promostyl struggle to find blues to fill the mini palette. The greens are similar, starting more with blues than green hues, before becoming greener in the second and third seasons. It was difficult to appreciate how the cold northern pastels of 1992/93 related to the woody greens and yellow greens of the following two winter seasons. When observed in a linear form, there is little correlation between the colours, in particular the final grouping.

3 pale blues, grey blue → 2 greys, dark green, putty →yellow, mid & dark green

As green is a basic colour grouping highlighted in previous Promostyl colour books, perhaps the company felt obliged to represent the group in such a manner, notwithstanding there were no greens in the first group. There are examples of all colour groups mentioned in the comparison, indeed it would be difficult to find a palette which did not contain representative colours from the five groups. Therefore, although all five colour groups were constantly available within the archive, the proportion of the groups changes each season. It may have been preferable for Promostyl to omit those less prominent colour groups from the comparison, focusing instead on colours which genuinely displayed repetition or progression, such as naturals. A more sophisticated approach to colour evolution comparison appeared in the Autumn/Winter 1996-1997 book, soon after the colour trend books changed to present a wider variety of more complex colours.

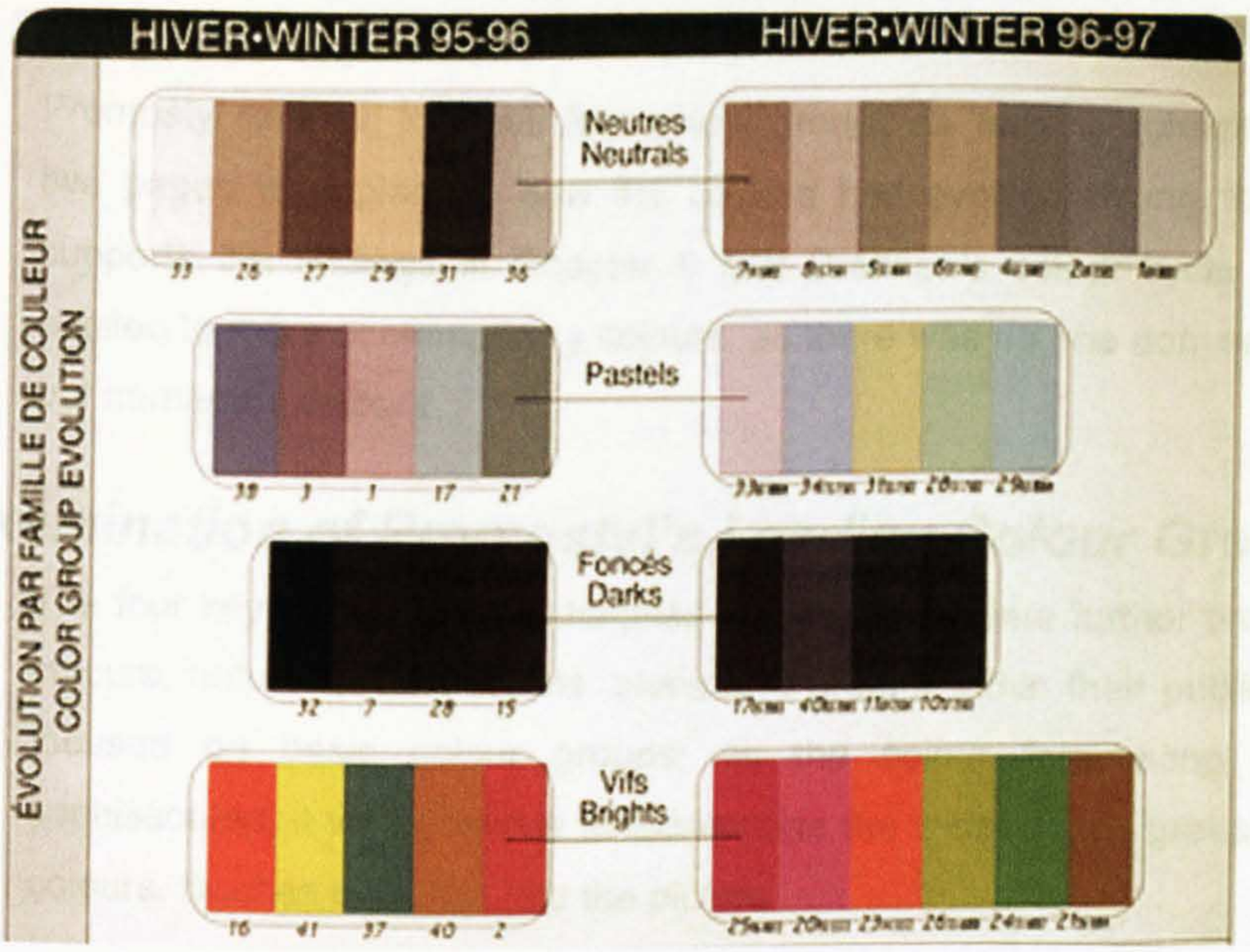


Figure 9-7: Promostyl Colour Group Evolution 1995 – 1997

Further information proving Promostyl analysed its colour developments systematically can be seen from Figure 9.7 which illustrates the 'Colour Group Evolution' between predicted colours from Autumn/Winter 1995 – 1996, 1996 – 1997. Within the image there is no written analysis, but would this be necessary? Clients could immediately identify colour developments from one season to the next, and map them across a range of colour groups such as brights or darks. Once again McKelvey & Munslow's 2008 theory that colours could be divided into four main groups appears to be true, as Promostyl themselves divide the colours into four key groups:

- Neutrals
- Pastels

- Darks
- Brights

It emerges at this stage Promostyl were again attempting to secure client confidence by illustrating how their trends evolved, rather than being a random group of seasonal colour propositions. Whatever the rationale behind Promostyl's initiative, it provided a clear indication of the gradual evolution of colour. As Perna (1987:34) stated:

'Designers are judged by the rightness of their predictions and bottom line profits, not only by their own financial backers, but by the press and the retailers – and most importantly, by the consumer.'

Perna (1987:34)

Promostyl referred to these four colour groups as 'leading colours' and devoted a further two pages to explaining how the colours had evolved during the previous seasons. It supports the findings in Chapter 8 that Brannon's colour cycle model is flawed when applied to more contemporary colours, as there was no one dominant group in the palette, but numerous colours.

9.5 *Examination of Promostyl's Leading Colour Groups*

The four key colour groups identified by Promostyl were further broken down into specific colours, naturals, reds, violets, blues and greens within their publications. These clearly focused on basic colour groups; as the colour forecasting books became more sophisticated, it was possible to extrapolate the initial colour groups further, bringing new colours, finishes or trends into the picture.

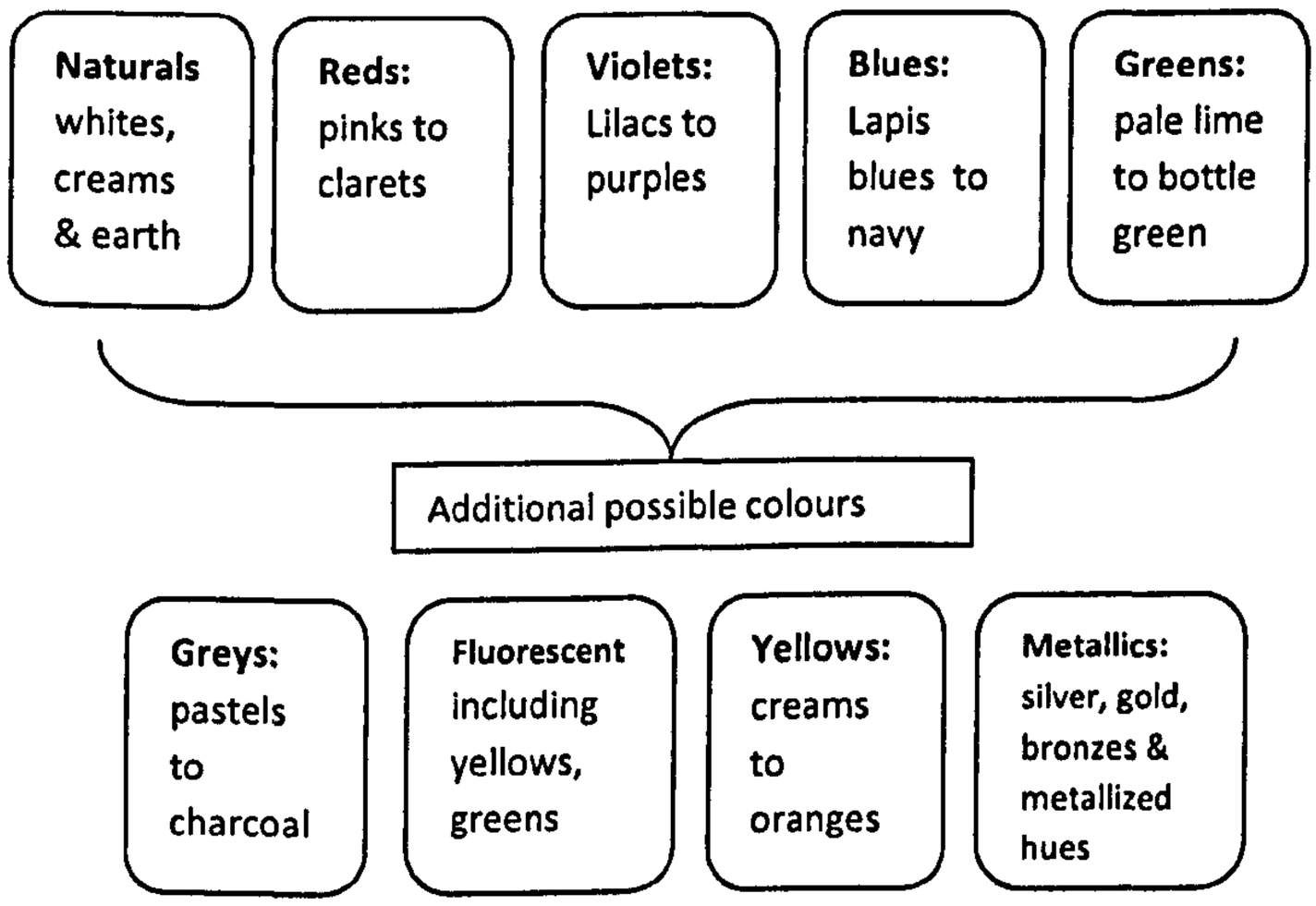


Figure 9-8. Promostyl's main colour groups expanded by the author

Promostyl were restricted in their thinking in that they did not consider colours which have time-limited popularity, speciality colours, or indeed separate greys from the neutral hues. In Fig. 9.8, the author has added four potentially important colour groups, greys, fluorescents, yellows and metallics, to reflect a more contemporary fashion palette. Whether the claims made by Hope & Walsh (1990), that colour cycles take a decade to fade in and out, or indeed if such cycles might be shorter as suggested by Lamb and Oberascher in Linton (1994), was examined by using the key colour groups from the archive. It may be there are no discernible cycles whatsoever as Stansfield and Whitfield (2005) found no evidence of cyclical colour phases in their research into interior colour. Such evidence would dispel the notion that forecasters or colourists could predict accurate colours by simply following such cyclical colour trends.

9.5.1 Naturals

Natural colours appeared throughout the books comprising creams, beiges and light brown hues. However, Promostyl fused the core basics featuring white or cream, or combinations of the two, each season, often linking them with other pastels, earth tones or greys. As discussed previously, naturals are a fundamental part of the core colour palette which manufacturers, designers and retailers use each season, and as such are difficult to segregate for analysis. Brannon (2000) indicated that subdued colours were usually followed by earth tones in her colour cycles model, Figure 9.4. Both these colour groups could be viewed as being from the naturals family, thus, it was decided not to analyse them as one group, but rather separate greys from neutrals.

9.5.2 Reds

Surprisingly reds did not appear to feature too strongly in the early Promostyl books, other than occasional coral reds, or reddish brown hues. According to Musso (2008) the 1980's was the decade of black, which was often linked to white or red and the combination occurred in the Autumn/Winter 1986/87 book as seen in Fig. 9.3. Stansfield and Whitfield ((2004) found reds were most popular in the 1980's but least popular in the 1990's. This indicates that Promostyl wrongly predicted the popularity of reds in the 1980's, using them sparingly, but correctly identified their overall unpopularity in the 1990's.

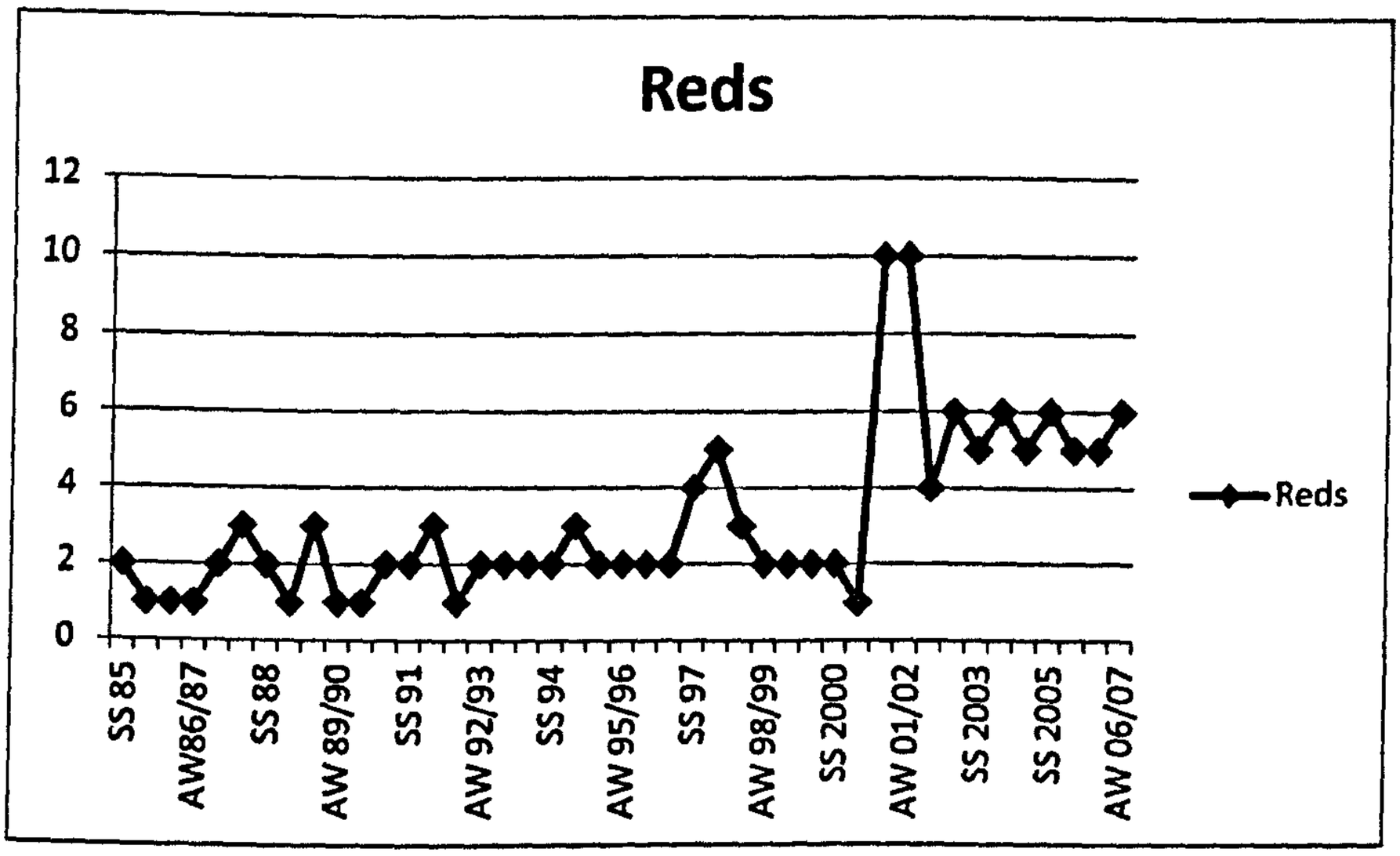


Figure 9-9. No. of Reds in Promostyl Palettes

It would appear from the archive that reds dominated a period of around seven years, a long period but not as long as perhaps Hope and Walch (1990) suggested.

9.5.3 Violets

The purple phase was one specific group identified by Brannon (2000) and Obersacher in Linton (1994) as having cyclical phases in fashion. Consequently, it required further investigation, potentially providing supporting evidence for clear colour cycles. Susan Iverson, the co-chair of the Colour Marketing Group has a possible explanation for the suggested recurrence of purples.

'Purple is the natural transition for colours moving toward blue with a red influence.'

Crispell (1997:1)

Evidence indicated violets were rarely seen until the early 1990's in any of the colour palettes. Even following an initial strong identification in Autumn/Winter 1992/93, there were few violets in the palettes, although they were complemented by some more blueish hues. Again, Stansfield and Whitfield (2004) identified slightly different frequencies of violets, with the 1980's as the most prevalent decade, but with occurrences far lower than their other colours, in line with the Promostyl palettes. This frequency, although it would be difficult to describe as a dominance, spans an eight year period, almost in line with Oberascher' observations, also arguably extremely close in duration to Brannon's purple decade. Joanna Bowring, who was Design Director at Courtaulds Textiles during this period, said of the colour during this period:

'Purple is notoriously difficult, there is also a trend for a blue-influenced purple next winter, although more as a highlight.'

(Tucker, 1995: 31)

Violet and purples emerged once again in Spring/Summer 2003, concurring with Oberaschers' observations of a seven year cycle; one would therefore expect them to be popular again by 2010 if the trend continued. This was not possible to verify within the Promostyl archive, but was considered in the Peclers and Nelly Rodi archive.

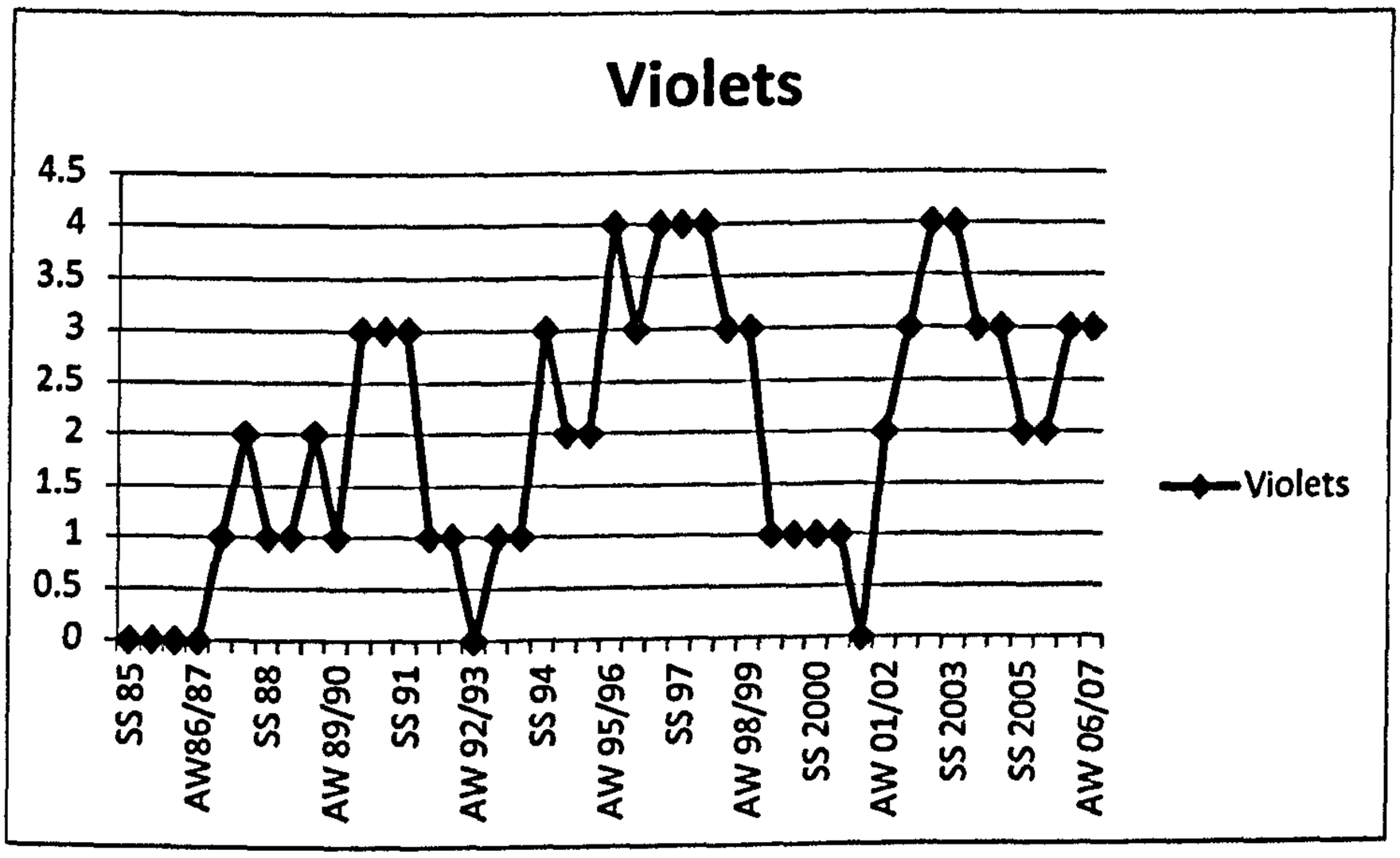


Figure 9-10. No of violets in Promostyl palettes

Analysis of the colour group did illustrate some recurring use, but not adequately to support Brannon and Oberaschers' theories sufficiently. Moreover, the quantities of violets and purples are very small in comparison to the other colours studied, so they cannot be considered as dominating the colour predictions, rather complementing the other colours surrounding them thus contradicting the notion of a dominant purple phase.

9.5.4 Blues

According to Crozier (1999) and Pantone (1992), blues are the perennial favourite colour of consumers; it is unsurprising therefore to find them featuring strongly in colour palettes spanning the archive, as seen in Fig. 9.11. Blues began to emerge more strongly and clearly in Summer 1989, although Stansfield and Whitfield's data suggests the 1980's witnessed the highest usage of blues, in particular pastels.

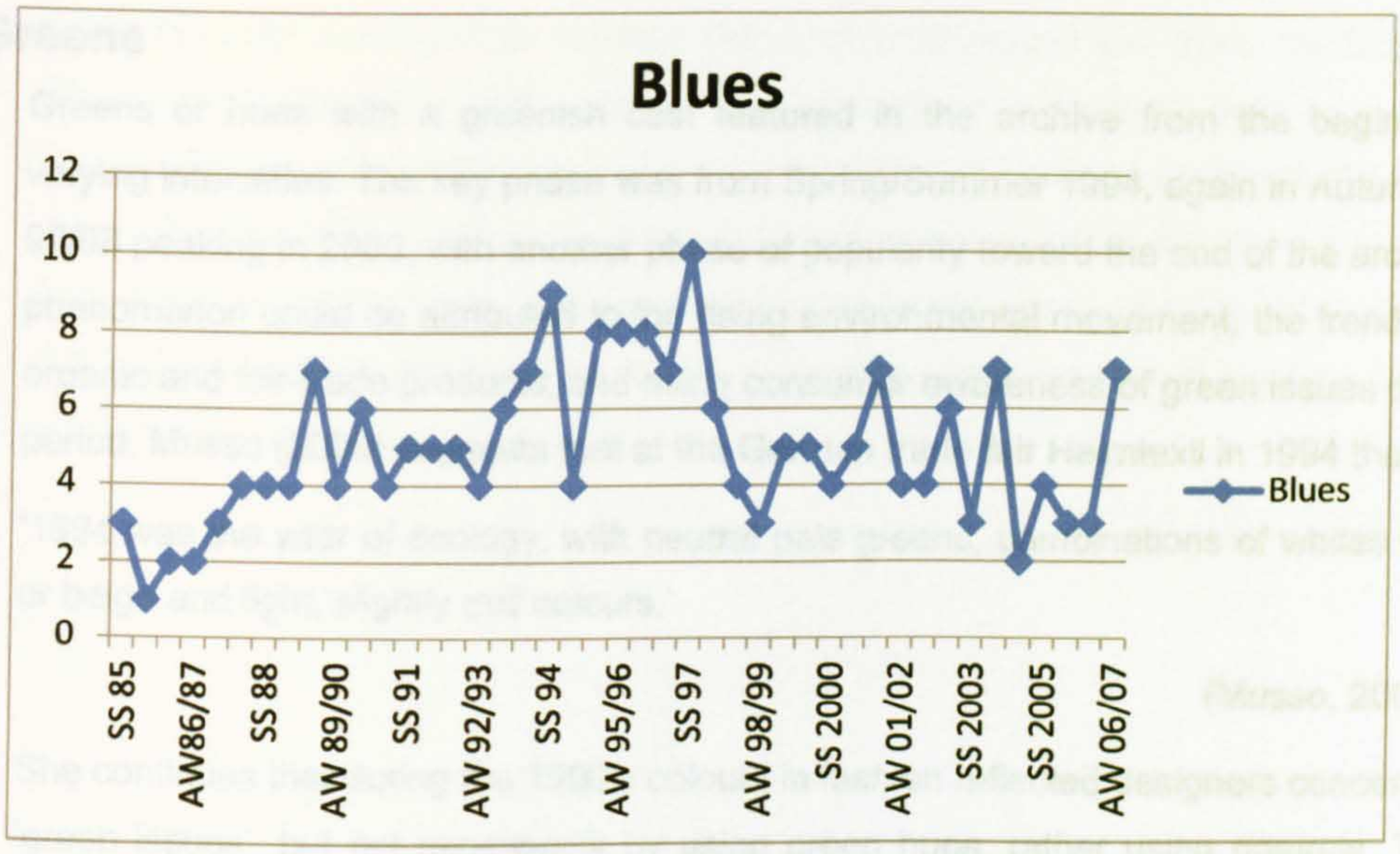


Figure 9-11: No. of Blues in Promostyl Palettes

The trend for clearer, stronger blues continued, developing into a virtually sustained blue period between Summer 1993 and Autumn/Winter 98/99 coinciding with the violets phase which lends more credence to the notion of a purple phase if the blues were incorrectly grouped with purples. The second main phase of blues was more staccato and less intense, featuring considerable peaks and troughs, from around 2003 to the end of the archive.

Figure 9-12: Blues in palettes from 1985, 1989 and 2005 and in fashion, Michael Kors and Narciso Rodriguez Summer 2005.

Aqua blues, as shown in the lower Promostyl books from Fig 9.12, were seen on the catwalks in 2004 for Spring/Summer 2005 by American designers Michael Kors and Narciso Rodriguez (Betts, 2004).

9.5.5 Greens

Greens or hues with a greenish cast featured in the archive from the beginning with varying intensities. The key phase was from Spring/Summer 1994, again in Autumn Winter 97/98 peaking in 2000, with another phase of popularity toward the end of the archive. The phenomenon could be attributed to the rising environmental movement, the trend for more organic and fair-trade products, and rising consumer awareness of green issues during the period. Musso (2008) suggests that at the German trade fair Heimtexil in 1994 that:

'1994 was the year of ecology, with neutral pale greens, combinations of whites with blue or beige and light, slightly dull colours.'

(Musso, 2008:1)

She continues that during the 1990's colours in fashion reflected designers concerns about 'green issues', but not necessarily by using green hues, rather using naturals. The data from Stansfield and Whitfield indicates greens were very popular in the 1990's in particular when coupled with yellow greens they totalled 16% of the overall colours used that decade.

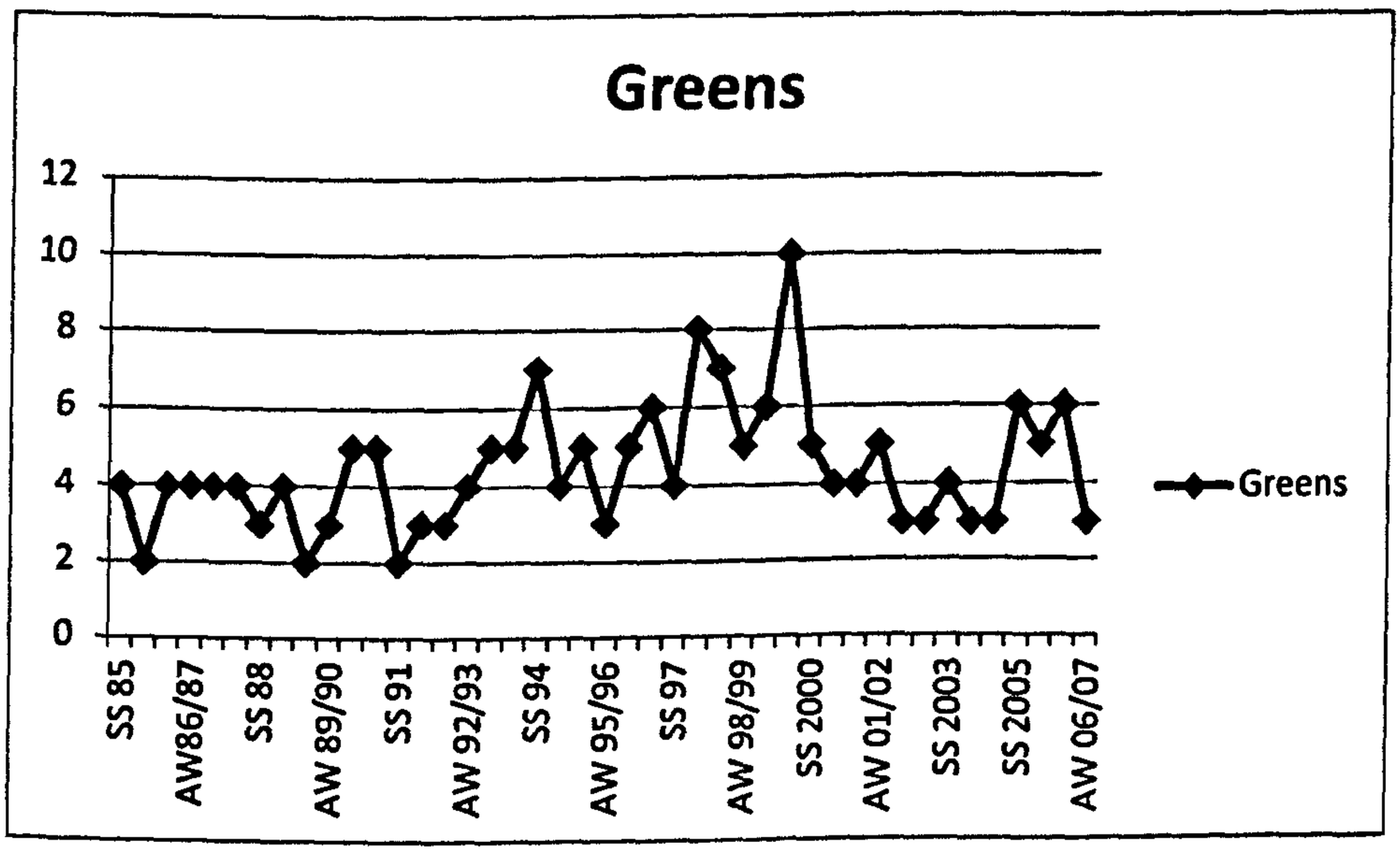


Figure 9-13.No. of Greens in Promostyl Palettes

9.6 *Evidence of Cyclical Colour Trends*

To summarise, there appears to be little substantial evidence of regularly repetitive cyclical fashion colour trends from the archive, which supports Stansfield and Whitfields 2004 findings with interior colours. However, some limited repetition was evident in purples, reds and blues from the five major colour groups identified by Promostyl in their publications. In particular, the 7 year cycle of violets in very small quantities were observed, but deemed

not sufficiently dominant to warrant the emphasis placed on them by Brannon and Oberascher. When the three main colour groups were mapped onto one another, it became far easier to identify the apparent dominance of blues and the lack of popularity of reds until after 2000. Overall, the number of colours presented in the trend books doubled from 1985 to 2007, which could account for the larger numbers of specific colours from 1993 onwards, at exactly the time retailers increased their number of seasons from four to six (Brannon, 2000).

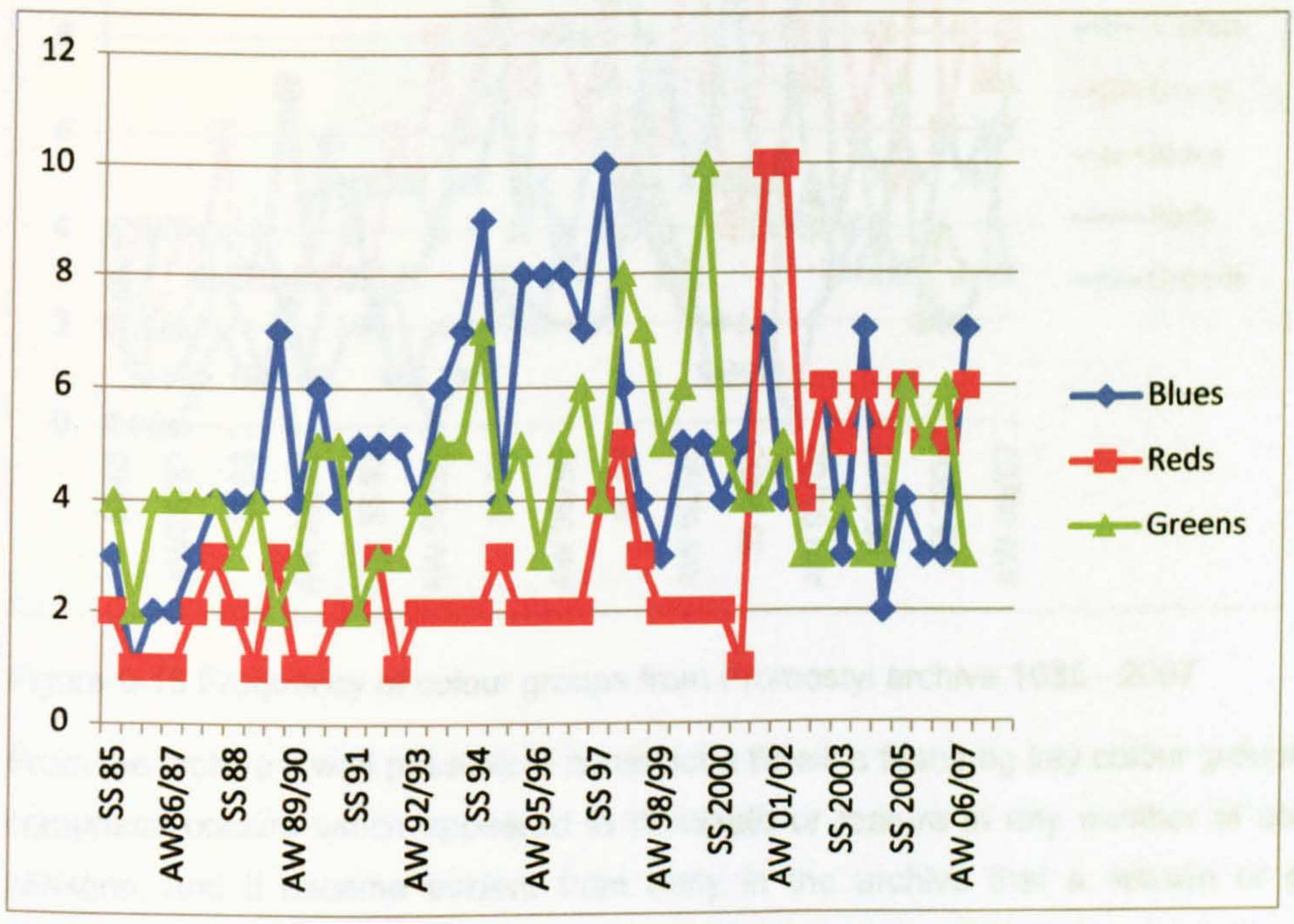


Figure 9-14. Occurence of Reds, Blues and Greens in Promostyl Palettes

Further examination was conducted to analyse groups of colours regularly selected by the company. These included dark colours coupled with pastels, candy colours from the entire spectrum, and fluorescent colours and provided a clearer indication of cyclical patterns overall. As can be seen from Fig. 9.15 below, there have been a rise in the number of colours presented by Promostyl in their publications since 1985, and the popularity of certain colours is clearly evident. Greys in particular account for the highest number of colours overall in several seasons, notably in 1998/99, 2001/02 and again in 2004/05. Violets were consistently the least popular in volume terms, but interestingly, unlike other colours, often disappeared almost completely from the seasons in cycles of seven to eight years. This may in part support the theory by Oberascher (1994) that purple phases run every seven years, or may indicate a transitional phase between blues and reds as Crispell (1997) suggested. However, the relatively low occurrence of purples questions the importance of labeling it as a 'phase' by itself, so caution should be used when

determining what constitutes a true 'phase', as the current nomenclature suggests purples and purple cast hues dominate the colour palettes.

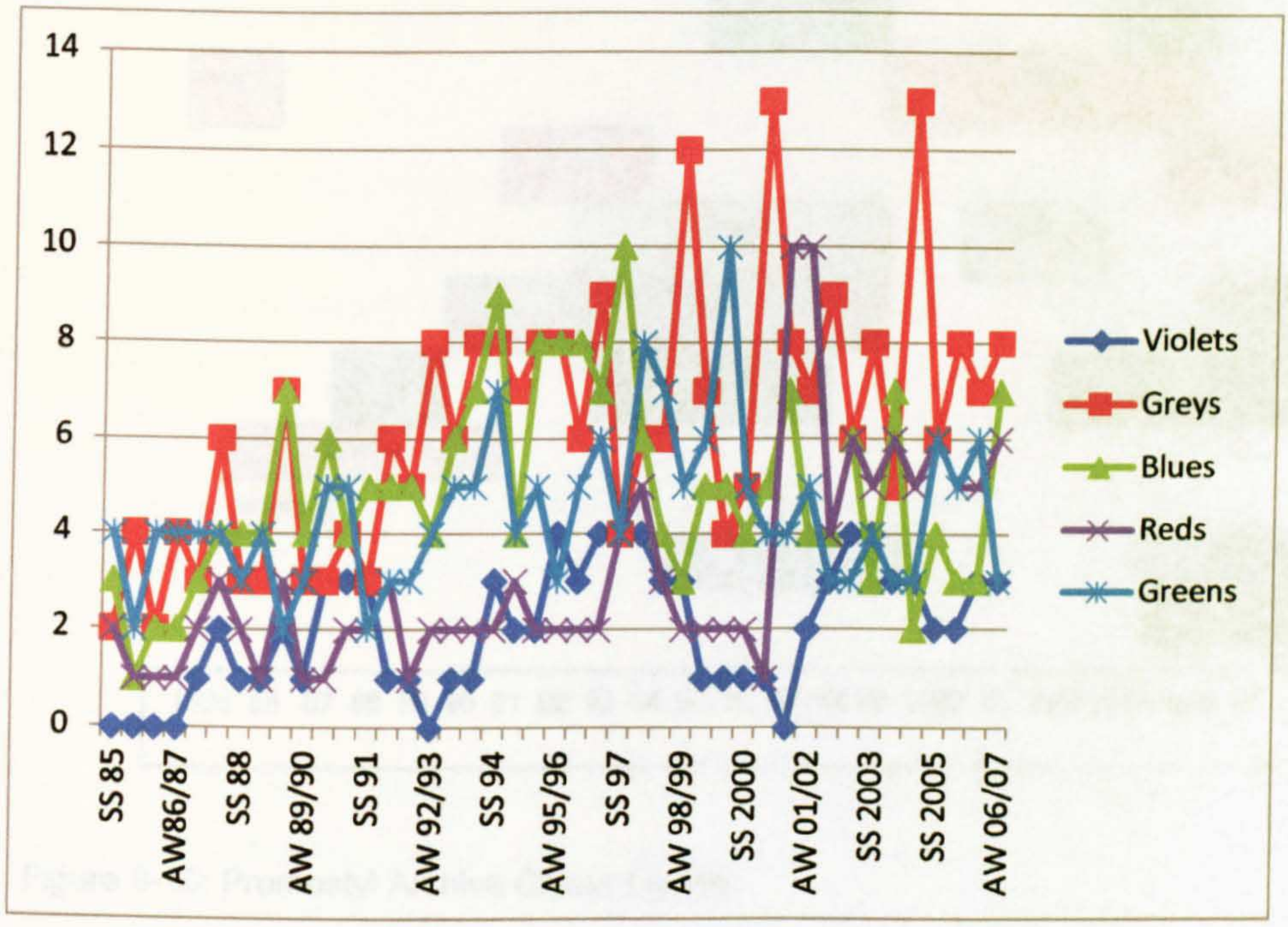


Figure 9-15 Frequency of colour groups from Promostyl archive 1985 - 2007

From the archive it was possible to construct a timeline featuring key colour groups. These comprised colours which appeared to dominate or feature in any number of concurrent seasons, and it became evident from early in the archive that a season or group of seasons could feature several dominant colour groups simultaneously.

The results of the analysis can be seen in a time line chart spanning 1985 to 2007 in Figure 9.15 where is it evident many colour phases run in parallel, essentially indicating that there is never one dominant colour theme, rather a group of different colours which become sufficiently important to last several seasons as new colour groups are introduced. This again supports the theory developed in Chapter 8 that no one dominant colour group exists in isolation and so disproves Brannon's model conclusively.

Further supporting this, when Fig 9.15 is compared with a more linear model expanding the range of colours and their combinations, as in Fig 9.16, there are some slight variations due to the colour combinations assessed, such as darks with pastels, brights, candy colours or fluorescents. Broadly speaking the repetition and importance of the colour groups remains similar between the two categorizations and trends run in parallel.

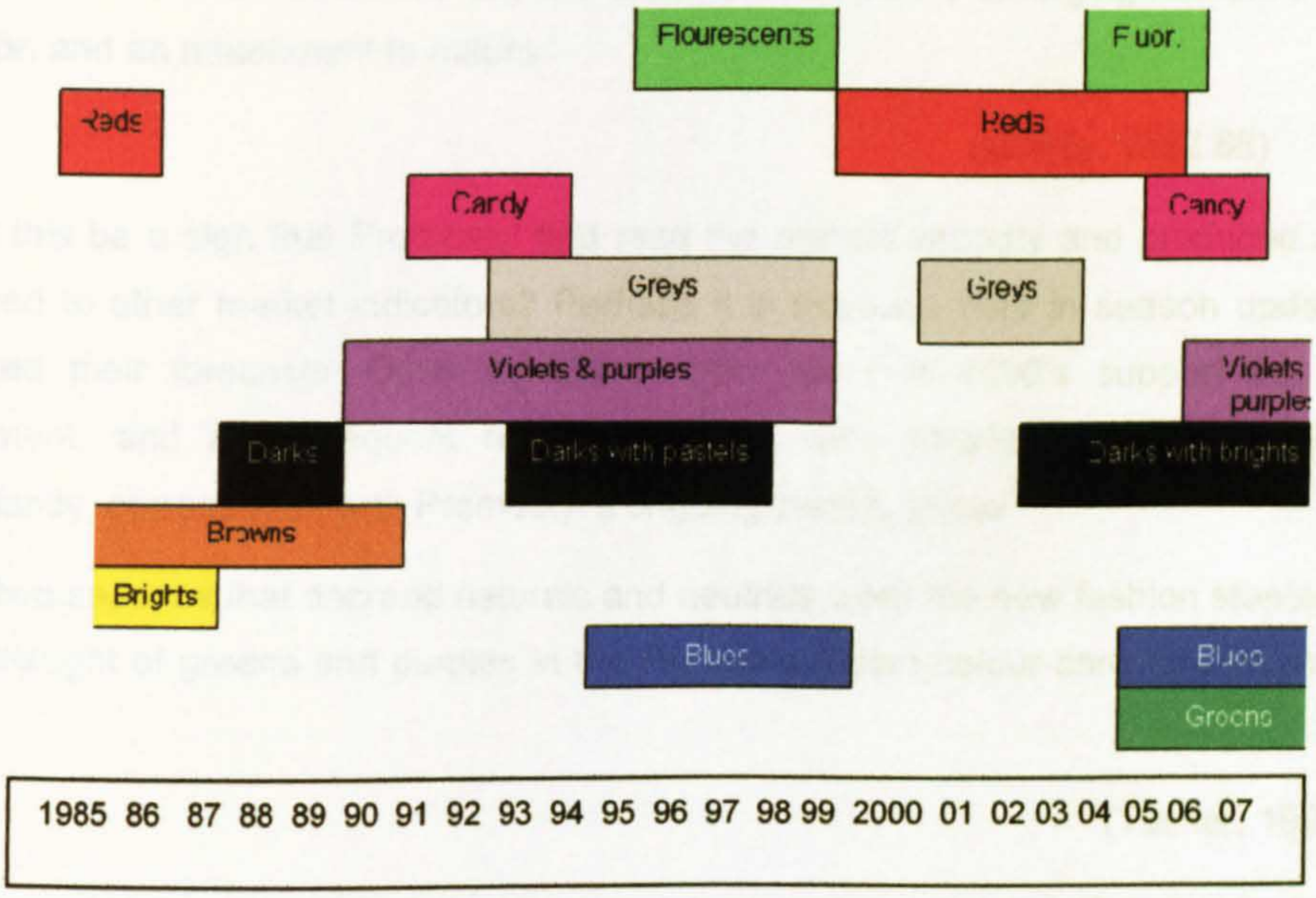


Figure 9-16: Promostyl Archive Colour Cycles

From Figure 9.16, it is apparent that despite the plurality of colour trends some colour combinations appear for on average a period of 5 years, shortening toward the end of the archive. This can be linked to the introduction of fast fashion principles, and the introduction of more seasons and phases for merchandise. The exception to this would be violets and purples, which featured in small quantities for almost a decade in the archive. Interestingly, the archive apparently confirms in a limited fashion some of the other elements in Brannon's colour cycle wheel (Fig 8.4), demonstrating that following a purple phase is a phase of high chroma colours, as the fluorescents, candy colours and reds follow a purple phase. Upon closer inspection greys, blacks and neutrals are also popular at the same time, which appear to contradict Brannon's findings. In Summer 1993 Promostyl's trend book proclaimed:

'Black & White are combined this season with colour for softened effects. Brights have gained momentum since Summer 1990. Following the intense primary colours, the fruity and warm tones, the near fluorescent and acrylic shades of last season, Summer 1993 reinforces an anti-natural orientation. The anti-fashion darks are at the peak of their success with a search for the most authentic base shades. We will see less strange half-tones and more interest in basic, authentic colours such as beige and navy blue.'

The anti-naturals promoted by Promostyl appear to be contradicted by Musso's experience at a 1994 trade show; and colourist Julie Buddy, who suggested:

'The Spring/Summer 1993 colour and fabric campaign of Literary Fashion... there is definitely a return to true values and the colour palette that is emerging reflects a sense of tradition and an attachment to nature.'

(Buddy, 1992:68)

Could this be a sign that Promostyl had read the market wrongly and produced a palette opposed to other market indicators? Perhaps it is because their in season update cards changed their forecasts. Other comments from the mid 1990's support the naturals movement, and a subsequent return to colour with greens and purples, and this, importantly, corresponds with Promostyl's ongoing purple phase.

'After two seasons that decreed naturals and neutrals were the new fashion staples there's an onslaught of greens and purples in the Premiere Vision colour card for Autumn/Winter 96.'

(Tucker, 1995:30)

In Autumn/Winter 1994/95 the company introduced a change. Greens had steadily developed within the palettes and greys emerged, perhaps an indication of their delayed move toward a more neutral, natural palette in response to the market, notwithstanding, Promostyl had correctly forecasted greens and purples, perhaps some consolation for inaccuracies in earlier seasons, as was outlined in the comments by Buddy (1992) and Tucker (1995).

9.6.1 Exploration of Grey as a Repetitive Hue

Further exploration of the grey repetitive colour group was required evidence indicated it was an important colour group. There were obviously two lengthy grey seasons from 1992 to 1998, and 2000 to 2002. The archive showed evidence of seasonal colour influence, but the wider market had to also be considered. It was established previously that grey is a basic or core colour, so consideration had to be given to the phenomenon that a basic colour could also be regarded as a fashion colour. Evidence that grey had been developed as a strong fashion colour came from Holgate (1998:61).

"A trend for colour often lasts the longest' reveals Liberty Buyer Angela Quaintrell. The proof: Grey's continuing pre-eminence. After school-uniform looks in '96 and '97's androgyny.... the grey face of autumn/winter '98 is streamlined luxury.'

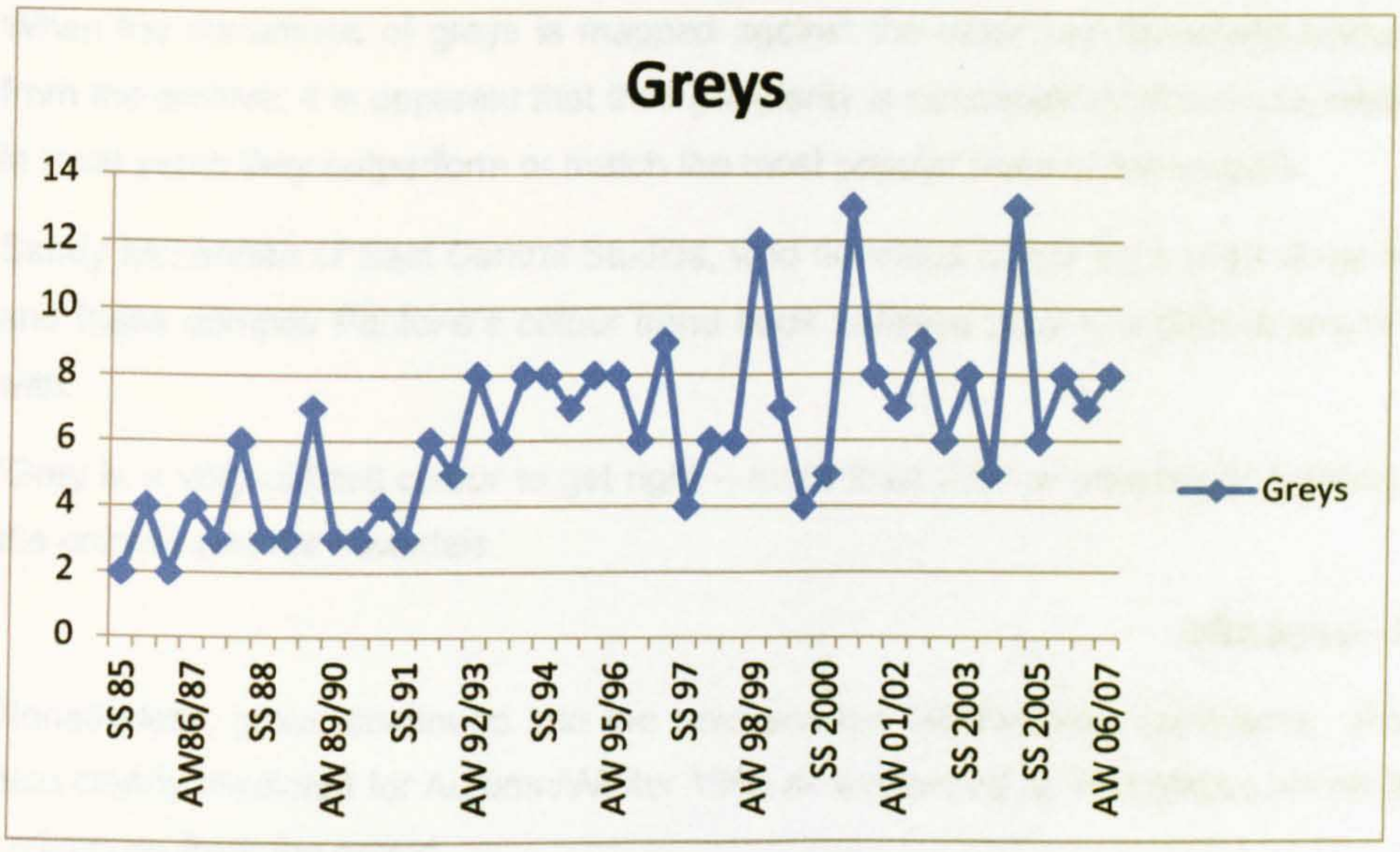


Figure 9-17. No of Greys in Promostyl Palettes

The International Wool Secretariat (IWS) Womenswear Colour Guide from Autumn/Winter 91/92 indicated in the February 1990 'Product Guide' that greys were going to be strong. The IWS 'Essentials' colour group described thus:

'Modern neutrals, perfect together. Fashion impact with grey flannel, charcoal flannel. Wear them with frosted tones for soft focus, subtle femininity.'

Similarly, Masters of Linen trends from Spring/Summer 1992 featured a range of greys and greyed hues 'colours of sand, earth and stone, colours of a smouldering volcano'. The archive indicated greys as influencing Summer 1992, supported by the Masters of Linen forecast, remaining important until Summer 2000, concurring with Holgate. On the catwalks grey was developing from Winter 1991/92 as can be seen in Fig. 9.18, continuing the next year. Promostyl correctly predicted the trend for grey and its transition from core to fashion colour.

Figure 9-18. Rifat Ozbek Winter 91, D&G Winter 92

When the occurence of greys is mapped against the other key Promostyl colour groups from the archive, it is apparent that their popularity is consistent for the winter seasons, yet in most years they outperform or match the most popular hues of the season.

Sandy McLennan of East Central Studios, who develops colour for a wide range of clients and helps compile Pantone's colour trend book believes grey is a difficult colour to work with:

'Grey is a very difficult colour to get right – more than 50% of people get it wrong in both the colours and the materials.'

(McLennan, 2008)

Nonetheless, greys continued into the next season, establishing dominance. They were also clearly predicted for Autumn/Winter 1996 as evidenced by Holgate's commentary and collections from the period.

Figure 9-19: Promostyl palettes Autumn Winter 1996/97 to Summer 1998, Prada catwalk Winter 1996 and advert from Winter 1997.

British forecaster Design Intelligence, were also promoting similar colours in their Colourstyle Autumn/Winter 1994/95 trend book. This was around the initial grey phase which was identified in the Promostyl colours; Design Intelligence featured a trend theme named Waterfront, and described its colours as:

'Dense storm cloud darks for heavy workwear fabrics.... Rich earthy green works as a surprising accent against the cool smoky palette.'

(Design Intelligence, 1994)

Cold weather colour for cocooning and protection against the elements.

Figure 9-20: Design Intelligence Autumn/Winter 1994/95

The evidence from fashion catwalks and other forecasters would appear to support Promostyl's initial, rather protracted grey phase in the 1990s. The Autumn/Winter 1998/99 season focused on another crop of greys and greyed colours. When Summer 1999 was compiled the grey theme continued, influencing a wide range of other shades. The book looked back over the previous seasons for the evolution of grey tones.

'Winter 97/98: cold and clinical with pale neutrals and grey which is coming on strong.

Winter 98/99: Greys dominate, for neutrals with a taupe, ochre or pinkish cast.

Winter 99/2000: Continuation of greys to set next to beiges. They are touched with yellow or green hues, thus resemble half tones.'

The next period of grey hues from Promostyl was somewhat shorter, from 2000 to 2002. In their Fall-Winter 2000/01 brochure 'The Beginning of the Millennium', Promostyl highlight one key trend as being specifically grey led. Chimera's colours are described:

'A range of tinted concrete shades associated with half tones and frosted pastels. Emphasis on coloured grey – between a blue and a grey.'

Figure 9-21. Promostyl Fall Winter 2000/01

In the colour update card for the Autumn/Winter 2001/02 season greys are paired with blues, and neutrals, changing slightly from the earlier published colour book.

Figure 9-22: Promostyl colours & update card Autumn/Winter 2001/02

Interestingly Promostyl also compared their forecasted colours in the update card with those shown at the significant Paris fabric trade fair, Premiere Vision, held just 12 months prior to the season. As Fig. 9.23 indicates, there were still some greys introduced from the show, but the majority of colours appeared to be from the warm browns, ochres and reddish tones, supporting the red phase which was running in parallel with the greys during the same period.

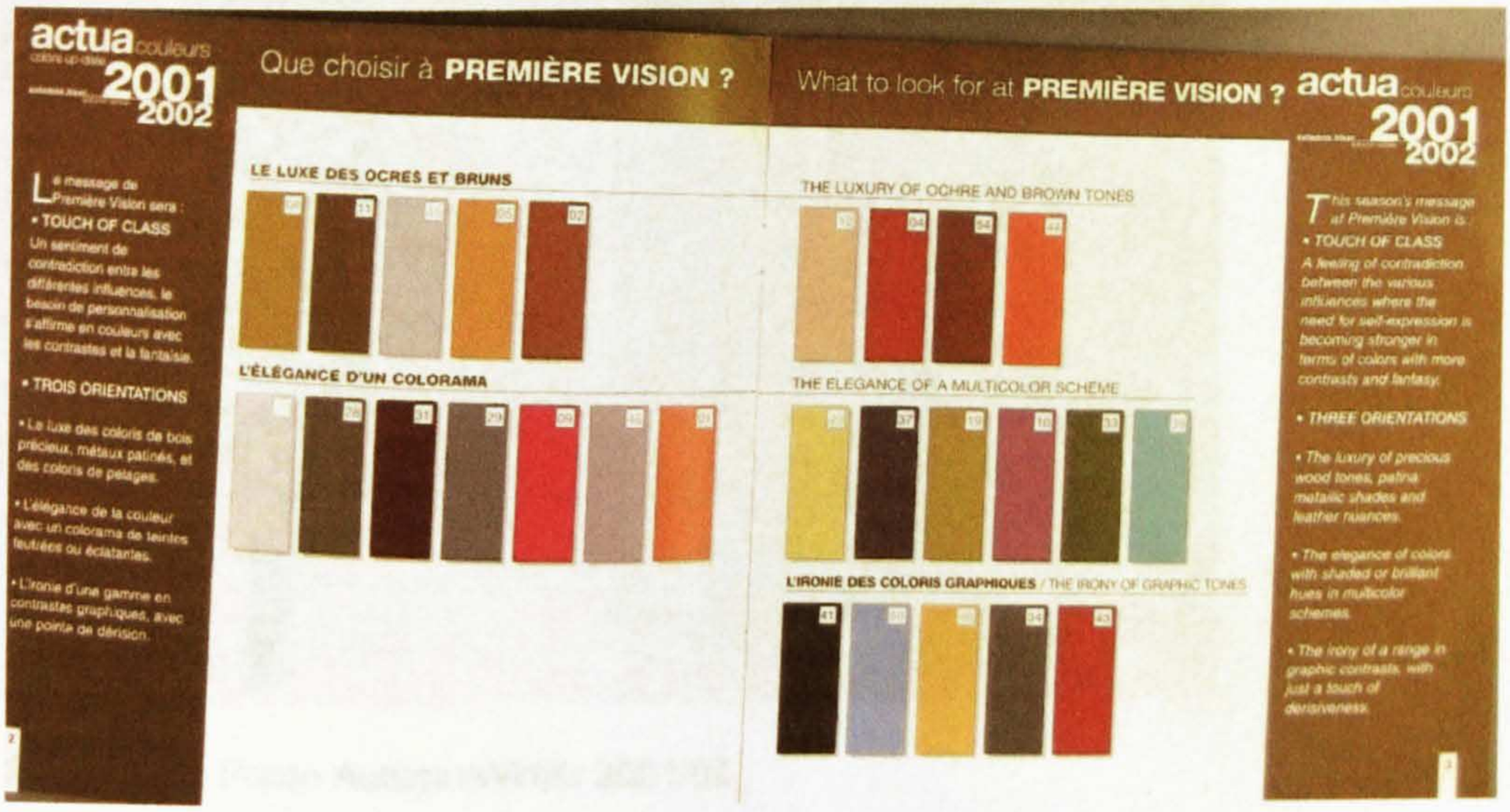


Figure 9-23: Premiere Vision Colours Autumn/Winter 2001/02

Further support for the predicted grey phase is also available, from another forecasting source, Cotton Incorporated, the American trade organisation supporting cotton. They promoted greys in their palettes from Fall/Winter 2000/2001 through to Fall/Winter 2002/03, as can be seen in Fig. 4.8 their Spring/Summer 2002 colour card, and Fig. 9.24 below, where the colours are strikingly similar to the trade shows colours the following year.

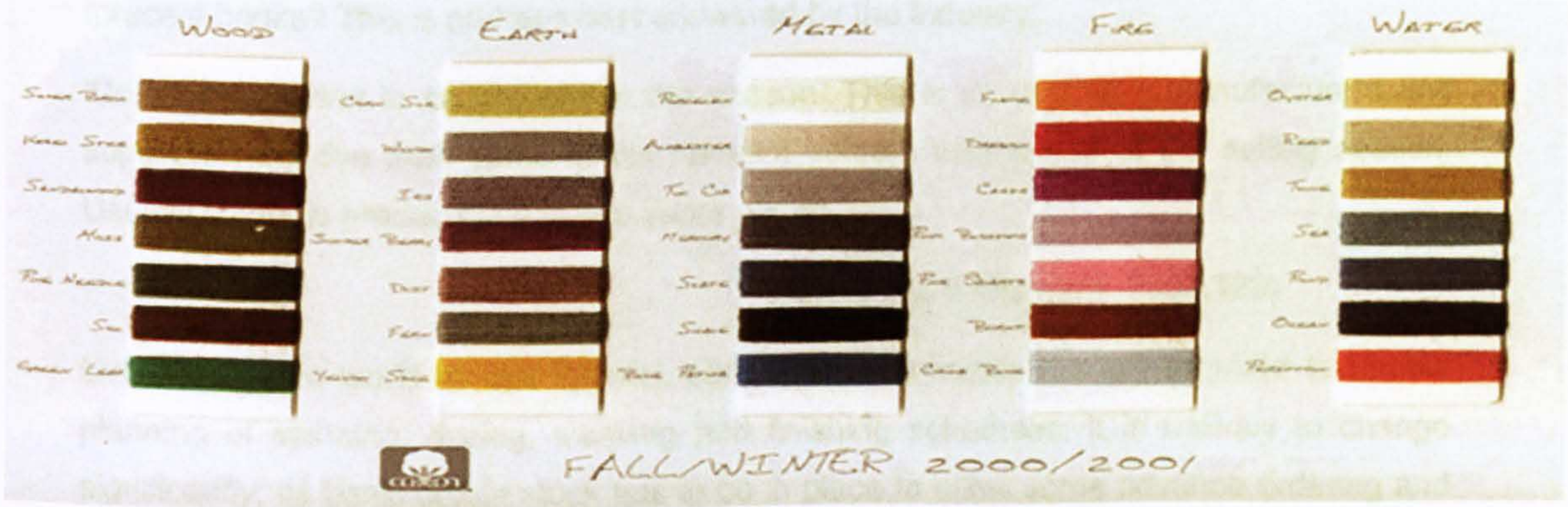


Figure 9-24: Cotton Incorporated Autumn/Winter 2000/01

Fashion trends for the same season were moving toward grunge looks, faded colours and worn or distressed clothing, so fitted the grey theme perfectly. A strong reddish phase running in parallel and a dark with brights phase coming in from 2001, which Promostyl had accurately predicted.

Figure 9-25: Prada Autumn/Winter 2001/02

Upon examination of catwalk trends for the same season, it is clear that both the grey and reddish browns were popular, working in synergy within collections, as seen in Figure 9.25, where Italian label Prada mixed dark charcoal greys with reddish browns, orange and cream. The collection verifies the claims made by Promostyl as to seasonal directions, but from the vast array of forty colours first devised and published almost two years previously, few reds had a brown cast, with no real oranges. How accurate were the original predictions? It would appear that the seasonal update card provided a far more accurate picture, which once again raises the question, why continue with the early colour forecast books? This is perhaps best answered by the industry.

'Colour is the first to be created in the season. This is so that yarn manufacturers and suppliers may dye their yarns in the relevant colours well ahead of the selling season. Usually colour is produced up to two years ahead.'

(McKelvey & Munslow, 2008:129)

Even in today's world of fast fashion, early colour forecasts are still required to enable planning of spinning, dyeing, weaving and finishing schedules. It is unlikely to change significantly, as basic colour stock has to be in place to allow some advance ordering and commitment to buying (Brannon, 2000, Goworek, 2001, Bruce & Daly, 2006). It is also interesting to note that of Promostyl's three thousand plus customers, more than half come

from outside the fashion and textile industry (Sherrill & Karmel, 2002); this could also account for the broad range of colours and significantly modified updates in later colour cards. Fashion colours, as mentioned previously, do naturally move faster than colours for other markets such as interiors, automotive or electrical consumer goods. More significantly, the archive provided an insight into how an apparently core colour, such as grey, can become a fashion colour, as in Fig. 9.26.

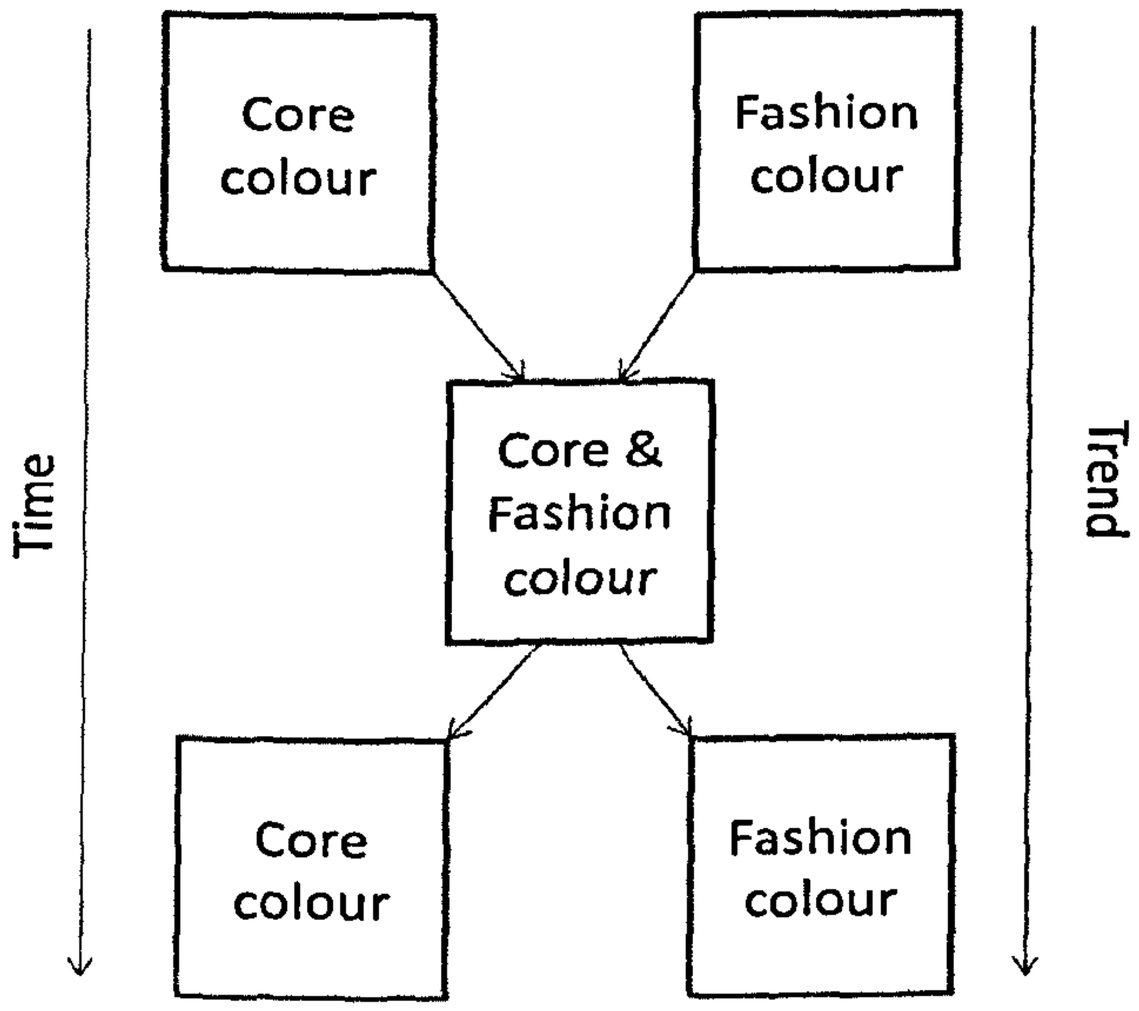


Figure. 9-26. Core colours with dual roles

The finding is significant as it has not yet been explored by other commentators and the key texts and was discovered to be central to higher sell through rates as consumers were familiar with them and bought them year on year. It would also explain other repetitive colour groups, such as blues and neutrals, which are regularly used as both basic colours and fashion colours in fashion.

9.7 Further Promostyl Colour Grouping

Additional colour groups not specifically identified by the company also proved to have popular groupings.

9.7.1 Pinks

In Autumn/Winter 2000/2001 the palettes adopted a strong pink cast. Of the forty colours in the book, seven were pink influenced, supported with lilacs and purples and the following winter a quarter of the palette was influenced by pinks, of particular note as pinks are usually associated more with summer palettes and with women's and girlswear, thus it could be argued that they would appeal to a limited market. By summer 2002 the pinks had developed into what Promostyl described as plastic purples; 'After the floral pink and mauve shades come purple as a key point for artificial hues.'

The Mix also featured a pink influenced palette in Summer 2002, named Solar, and other themes within their colour trend book also featured more pinks, supporting the evidence in the archive. The palette incorporated some of the other colours featured in the Promostyl book for the season, the deep purples, warm yellows and camel.

Figure 9-27: The Mix, Solar, Summer 2002 and Chanel Summer 2002

Interestingly, in both seasons there remained a strong blue counterbalance to the pink palettes, perhaps the masculine equivalent of pink, or perhaps simply a commercial inclusion of a colour popular with most customers.

Figure 9-28: Colour comparisons from 1987, 2000/01 and 2006/07

9.7.2 Darks and pastels in winter

The evidence from the archive supports McKelvey and Munslow's theory regarding four limited seasonal colour groups. Within the archive there was often a group of dark colours, offset with pastels or brights. The dark palettes often became much darker in winter when they were paired with other dark colours. Joanna Bowring, at the time Design Director at Courtaulds Textiles, indicated in 1995 that colour was more difficult to sell in winter than summer (Tucker, 1995), but that ' the consumer needed to be educated to accept brighter Autumn/Winter colours.'

In the same article, Jan Davis, designer at WoolfeEurope said black always outsold everything on a 3 to 1 ratio, supported fifteen years later by Sian Edwards, Technical & Colour Fabric Manager for Womenswear casuals at Marks and Spencer who indicated they always have ladies trousers, skirts and basic t-shirts in black as bestsellers.

Spanning twenty years, similar colours emerged from palettes from Autumn/Winter 1985/86, 1994/95 and 2003/04. They each comprised a set of blackened darks, a pastel group a mid toned range and a greyed off range, as seen in Figure 9.29. The similarities are immediately noticeable. Perhaps the reason this was repeated is related to the core colours which retailers work with season after season. Grey has already been identified as crossing the boundaries of a core and fashion colour simultaneously, so the palettes can be regarded in the same light.

Figure 9-29: Darks palettes, Autumn/Winter 1985/86, 1994/95, 20003/04

9.8 Summary of Cyclical Colour Trends

In summary, the evidence suggests there are clear repetitions of colour combinations in parallel from the Promostyl archive. However, there appears to be no one dominant group at any period, although some colours such as greys appear more frequently than others.

The most often repeated cycles are darks with other colours, either pastels, brights orgreys. There is a simple and logical explanation for this occurrence, other than theories linked to socio-economic, technological or cultural influences; darks have been identified during the course of the research as being amongst the core, or basic colours, repeated each season by the manufacturers and retailers, and in demand by consumers. As with grey, it can represent both basic and fashion colours simultaneously. A wider range of more complex colours started in the early 1990s, expanding from twenty to forty colours each season. By offering more colours, it could be argued that Promostyl would cover most colour groups, and therefore appeal to a broader range of international markets and customers. Unfortunately, no substantive evidence of regularly repeating, clearly delineated cyclical colour trends emerged from the archive, from which a model could be established.

9.9 Colour Accuracy and Update Cards

From the archive it is difficult to estimate exactly when colour update cards were introduced by Promostyl, as they were rarely present with the original books. Colour updates are often produced and distributed free of charge to clients six months to one year following publication of the trend books, allowing considerable modifications to original predicted colours. Consequently, the forecasters promulgated the notion that they were producing accurate predictions.

The earliest update in the archive dated back to Autumn/Winter 1996/97 book which would have been published almost two years prior to the season in January 1995; at the time Promostyl had also started publishing an early colour trend card in the December.

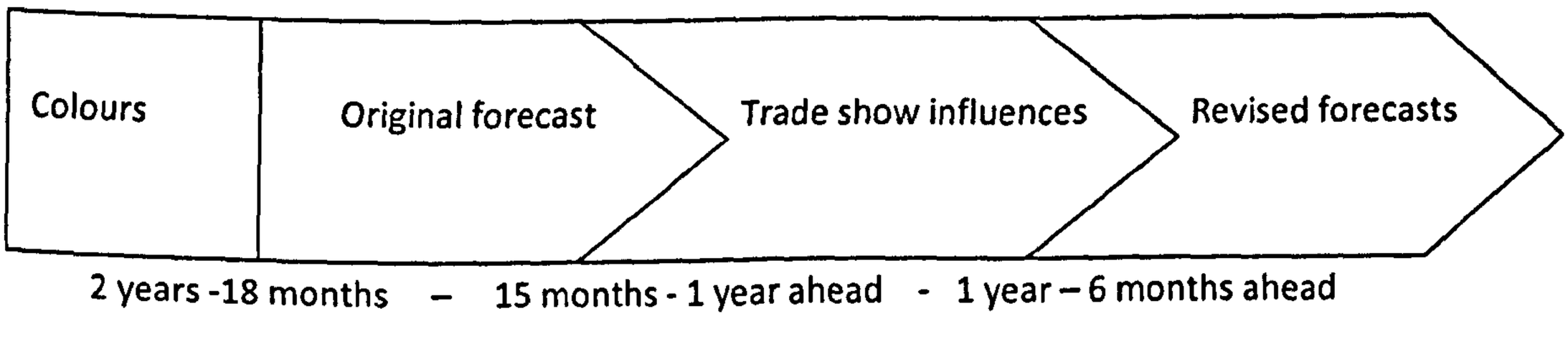


Figure 9-30. Timeline to update cards

The six page booklet included comments and colours from twenty seven clients in seven countries, and four colour palettes selected by them, undoubtedly specifically to comment on the accuracy of Promostyl's forecasted colours. There were a further three palettes of Promostyl updated colours, and information from the key trade shows of the time from

which four colour palettes which corresponded to colours previewed at the shows was developed, essentially a synthesis of the show colours.

Figure 9-31: Promostyl Autumn/Winter 1996/97 colour book and update card

Notable for its omission were the very bright hues which did not appear in the update. Colours selected by Promostyl clients closely match the original palette of turquoises and purples; The Cold Neutrals story was also confirmed by their clients, as were most of the Elegant Darks palette. In the three final palettes proposed by the company, two remained almost unchanged. Upon examination of the show colours, there were many which chimed with the reworked Promostyl colours, although in differing proportions or combinations. The closest palette was perhaps the blueish grey neutral one. Moreover, this was obviously produced to bring Promostyl's forecasted colours in line with the more recent influences from the trade shows, but suggests there were mistakes in the original forecasts which required correction. In essence, there was something for everyone in the seasonal updates provided by Promostyl. Clients could naturally chose to ignore the updated colours and continue to work from the initial palettes.

9.10 Comparison with Nelly Rodi and Peclers Colour Predictions

From the Promostyl archive it had already been concluded that repetitive colour trends usually ran in parallel and did not follow any discernible time frame patterns. Some colour palettes and combinations also repeated, and key hues had a more discernible lifecycle than others. Core colours could become fashion colours, as in the case of grey. Did the various forecasters indeed predict similar colours across the seasons? This was tested further in the Nelly Rodi and Peclers archive analysis.

9.11 Initial Observations

The initial stage was to establish the use and frequency of the key core colours, darks and neutrals throughout the seasons, specifically for the Peclers publications. These were identified in the Promostyl archive as having a dual role as both core and fashion colours. Several comparisons of selected palettes between the various forecasters were examined for similarities and differences. Initial observations surrounded two groups of basic or core colours, darks and neutrals, including greys, to assess their influence on the seasonal palettes.

9.11.1 Frequency of Dark Shades

In Summer 2005 there were numerous dark shades in the Peclers trend books, as illustrated in Figure 9.32., navy, browns, greens and greys featured in the theme In the shade, and of these five colours appeared virtually the same in Autumn/Winter 2005/06. The hues lightened, as would be expected for a summer season in 2006, Figure 9.33., but in Autumn/Winter 2006/07 the dark shades reappeared again with the same colours distributed between the two themes. During the same period Promostyl featured a range of deep blues, greys and purples, but also had a strong pink cast.

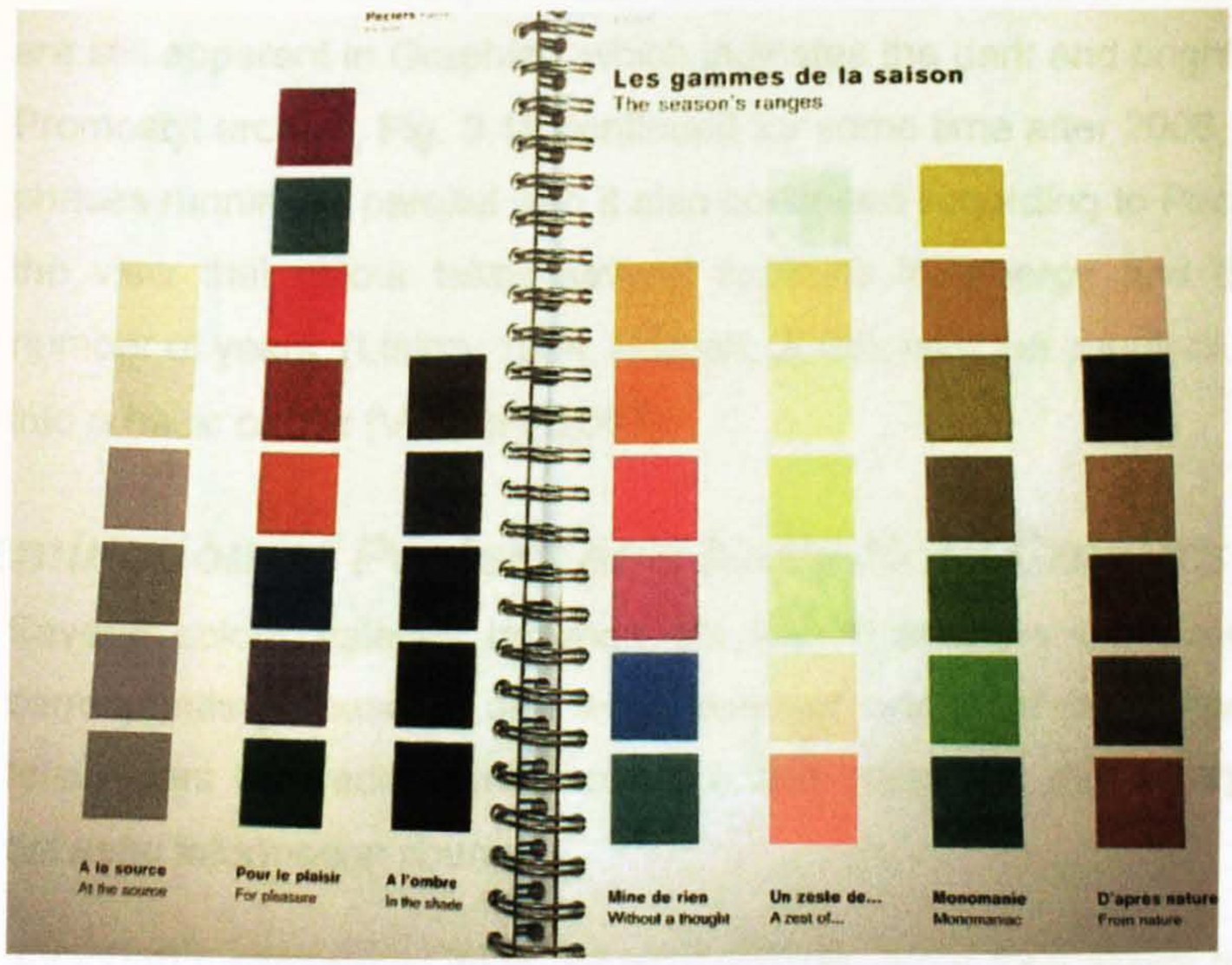


Figure 9-32: Peclers Summer 2005 colours

Figure 9-33:. Pink influenced palettes Summer 2006, Autumn/Winter 2006/07

Figure 9-34:Peclers Summer 2006 colours

The colours are virtually identical in Summer 2009 and in Autumn/Winter 2009/10 they are still apparent in Graphics, which indicates the dark and brights phase identified in the Promostyl archive, Fig. 9.15 continued for some time after 2006, and the green and blue phases running in parallel with it also continued according to Peclers. This would support the view that colour takes several seasons to emerge and develop and can last a number of years, (Linton, 1994, Hibbert, 2008), with the eventual possibility of developing into a basic colour (Viannay, 2007).

9.12 Examination of Peclers and Nelly Rodi Colours

Several colour palettes between the two forecasters were remarkably similar within corresponding seasons, and were deemed worthy of inspection. It is not unusual for forecasters to predict similar colours, and supported the theory that there is synergy between information sources.

'Although a conspiracy does not exist among colour forecasters to dictate colours, colour forecasters are in agreement the majority of the time. They attend the same fabric trade shows...shop the same trendy boutiques and watch street fashion. They are members of one or more colour associations and collaborate with other members to develop colour forecasts.'

(Brannon, 2000:118)

Rinallo and Golfetto (2006:857) believe it is an intentional action on behalf of the fashion industry and key players within it.

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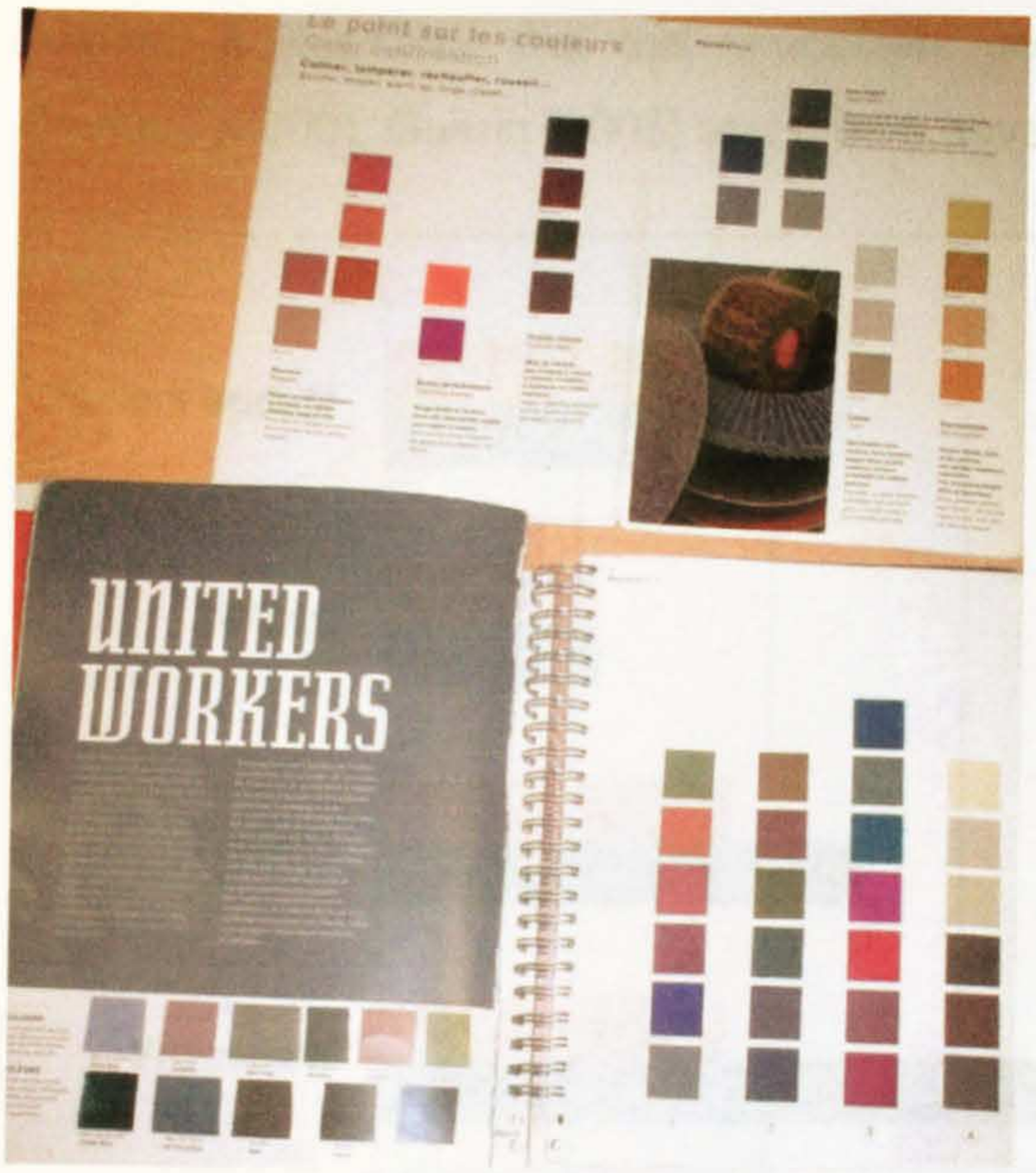

Figure 9-35; Autumn/Winter 2006/07 colours

Figure 9-36.Promostyl Autumn/Winter 2006/07

There were a large percentage of shared colours between the palettes, not considering the overall Nelly Rodi colour palette, which was presented differently to the other two examples. Considering the variable of the different number of colours available in each palette, Fig 9.37 illustrates that over 70% of the colours in both the Peclers original and updates colour cards could be judged to be alike, with the update card having a slightly higher percentage of corresponding colours, an anomaly due to the lower number of colours available in the updated palette. The small sample from Nelly Rodi matched all the colours within the Promostyl palette, Although this is a restricted snapshot of one

season, it illustrates that the forecasters do achieve very similar colour results as Brannon (2000), Guerin (2005) and others have suggested.

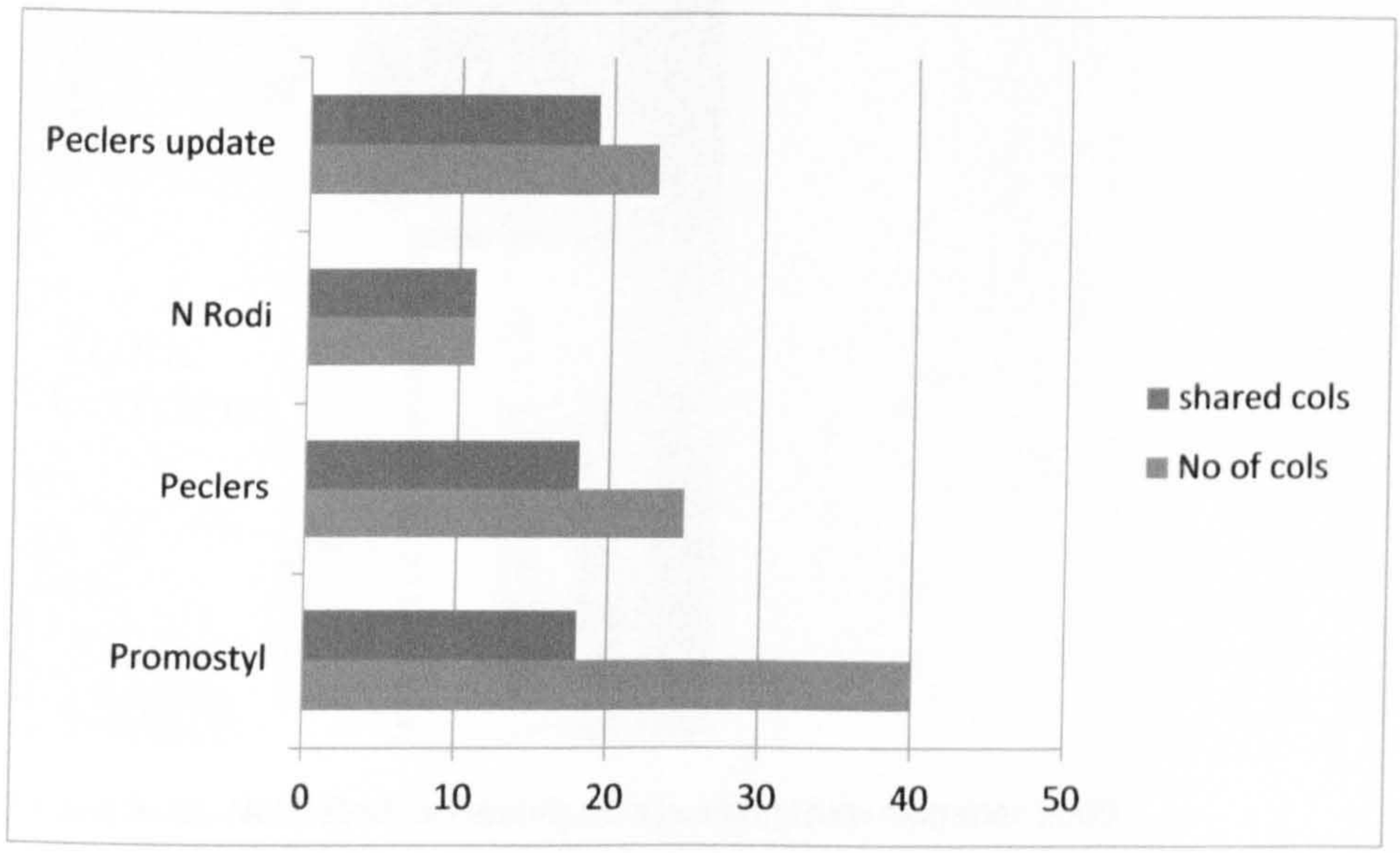

Figure 9-37. Percentage of shared colours A/W 2006/07

This could be a reaction to the developing market, lifestyles, new designer collections or simply a reflection of similar sources of inspiration and development of trend being used, as evident in Chapter 8 and 6.

9.12.2 Summer 2009 Nelly Rodi and Peclers

Unfortunately no comparative Promostyl palettes were available for Summer 2009 as the archive ended in 2007, thus only Nelly Rodi and Peclers were compared. The palettes had very marked similarities, particularly upon examination of the Peclers original colour book, and their later colour update card, all pictured in Figure 9.38. Pastels featured in both palettes with some slight variations; there were no blues in the Peclers colour palettes, but the similarities are striking indeed, and a comparable theme of chemically enhanced or imbalanced nature worked in both. The later Colour Confirmation Card, changed the predicted colours somewhat, although not markedly; Nelly Rodi did not have a colour update card so it must be assumed for the purposes of the research the colours remained consistent throughout. Nelly Rodi described the theme 'a new crazy style, playing on the deformation of motifs and transformation of colours creating the unpredictable.' In spite of this assertion, the colour palette does not appear significantly unique or unusual, and indeed could be seen in a very similar grouping in Promostyl's Autumn/Winter 1996/97 pastels, as in Fig 9.7.

Figure 9-38: Nelly Rodi & Peclers comparison from Summer 2009

Within the same season it was possible to find similarities in the remaining colour stories produced by each forecaster. Interestingly a similar group of colours had been forecasted seven year earlier by British colour specialists The Mix, see Figure 9.39.

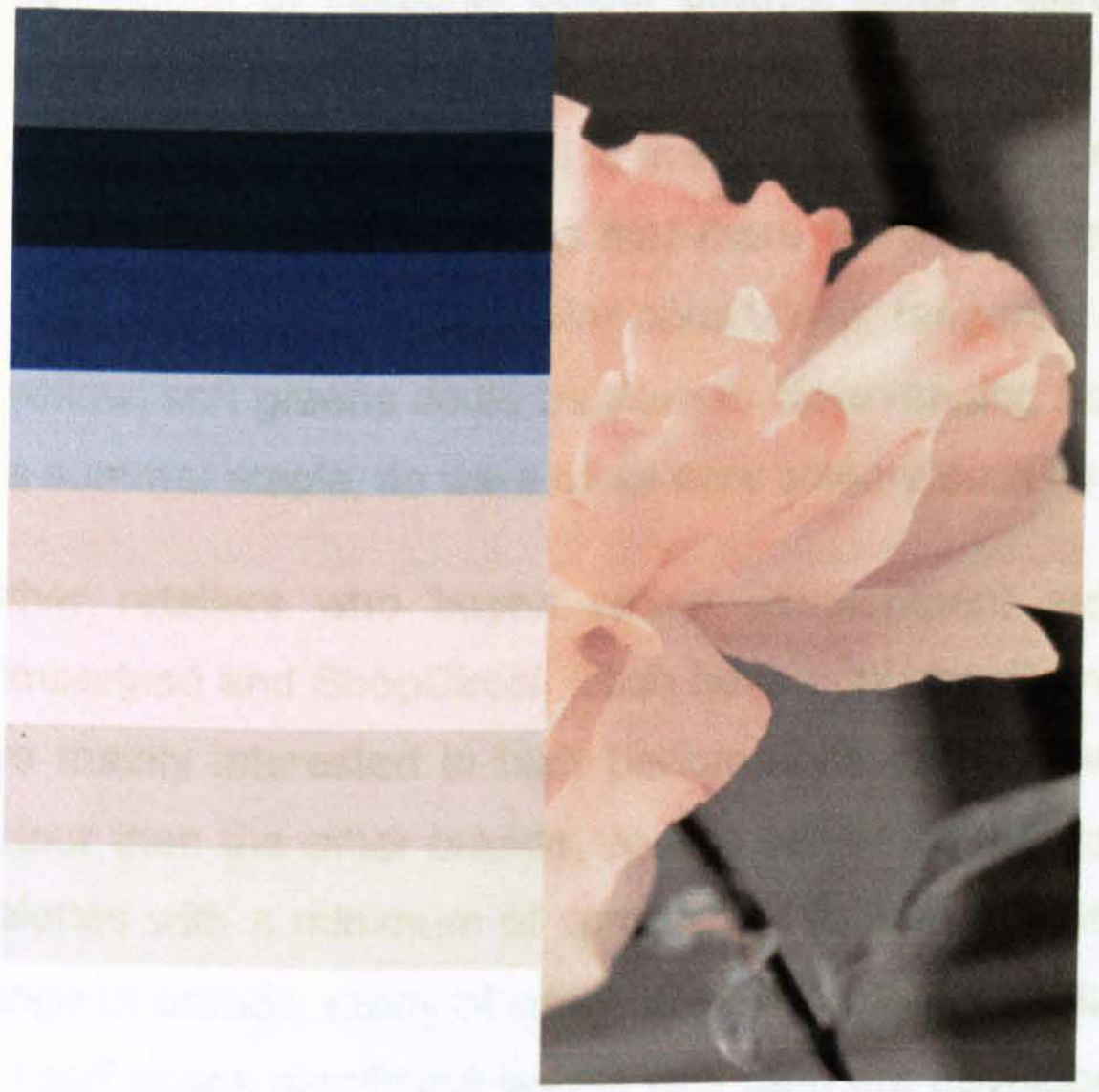

Figure 9-39: The Mix, Ambiguous', Summer 2002

Figure 9-40: Lanvin Summer 2009 (source www.style.com)

When reviewing the major Summer 2009 catwalk colours for confirmation of commerciality of the colours, the evidence is clear. Nevertheless consideration should be given to summer's traditional paler, pastel colours and to McKelvey & Munslow's (2008) delineation of seasonal colour groups. Notwithstanding, the major, directional fashion houses, Balenciaga, Lanvin and Fendi used similar peach and nude tones, with an icy blue, as predicted. Colours in this particular group did translate into mainstream fashion, but with the understanding that there were other major colours of the season; brights were ubiquitous, in particular cobalt blue, tangerine orange, fuchsia pink and sunflower yellow; soft greens could be seen in store ranging from olive to jade; dove grey was also a summer staple, as were other core colours such as black, navy and white.

Other retailers who based colour development around their customer profiles were Timberland and ShopDirect. Each have very specific requirements; Timberland customers are mainly interested in high performance clothing with far less regard for high fashion colour than the other brands, so it is easier for the company to develop their own colour palettes with a minimum of commercial forecasting information. Shop Direct have a wide range of brands, many of which are available in very large sizes, up to a size UK 32. This in itself poses significant issues with garment development, as a size UK 10 garment will naturally look quite different when sized up to a UK 32. Consequently, the company's brands work closely with specific signature colours which they recognise are appropriate for their larger sized customers.

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Figure 9-41: Balmain, Lanvin & Max Mara Summer 2009 (source www.vogue.com)

The colour palettes from both companies did cover the majority of colours, but appeared to miss the cobalt blue of the season, which completely omitted from the Peclers palettes. However, bright orange, yellow and greens were predicted by both companies. In summary, many of the forecasted colours were accurate; however, there were some major stories which were completely missed, even with the assistance of a later colour update card. The figure of 80% accuracy quoted by Perna (1987), Hipsey (1995) and Nash (2006) would appear to be good rule of thumb for both forecasters in the Summer 2009 season, accurately predicting a large percentage of popular colours.

9.13 Core Colours as Fashion Colours

It was established from the Promostyl archive that basic colours such as grey, black and neutrals could simultaneously be deemed fashion colours and sold through in high proportions. Further evidence of this is available from Autumn/Winter 2009/10 DMU archive due to the monochromatic nature of the palettes. Moreover, all colours in both palettes were from the core colour range, further strengthening earlier findings that core colours can also become fashion colours.

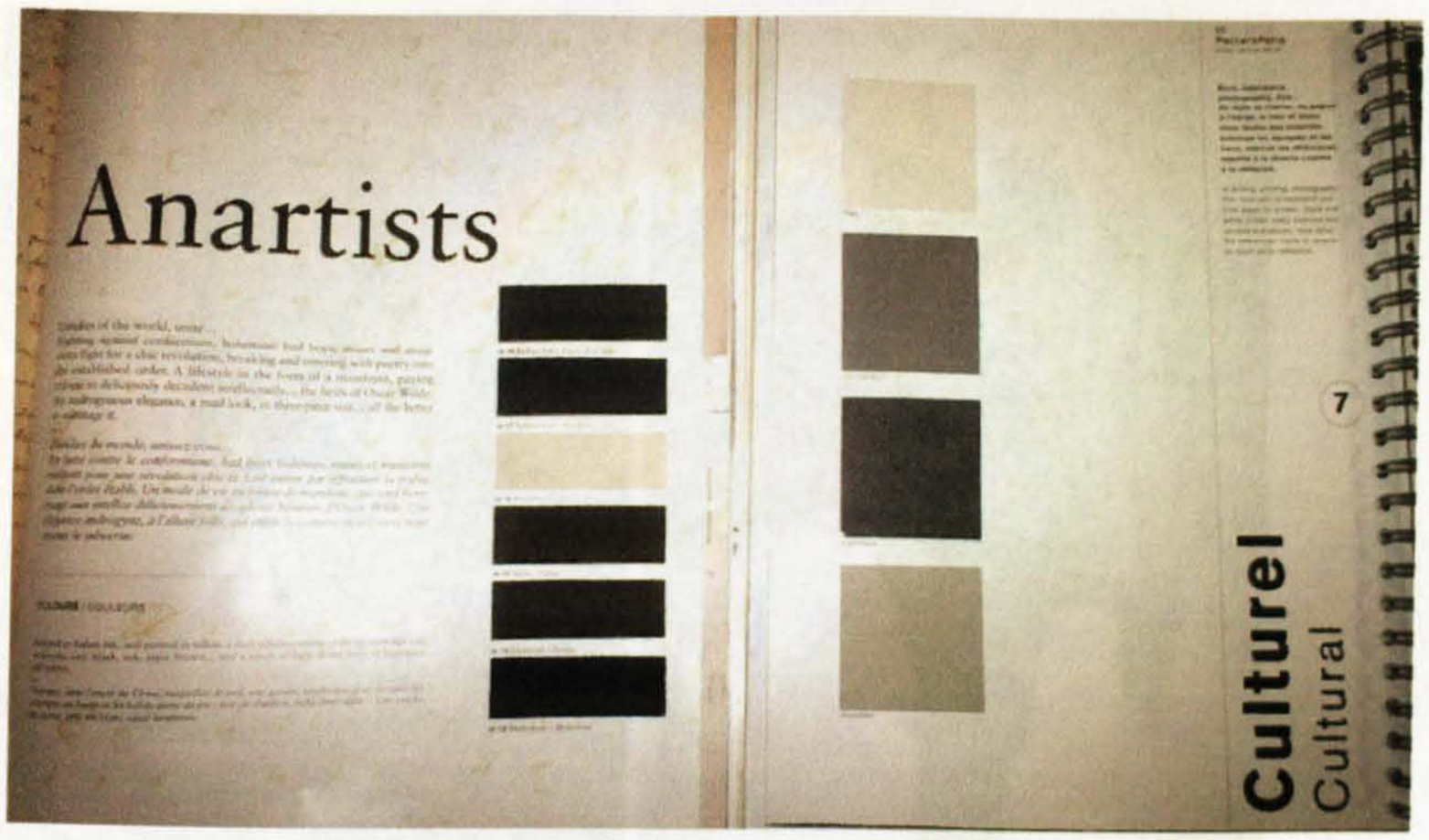

Figure 9-42: Autumn/Winter 2009/10 Nelly Rodi, Peclers comparison

Similar colour groups can also be found in the Promostyl archive, and in the 1986/87 Promostyl trend Aesthetic Basics.

Figure 9-43 Promostyl Autumn/Winter 1986/87

Simultaneously The international catwalks were replete with black leather, gothic influences and masculine looks from Gucci to Balmain, blackened shades dominated, supporting the forecasters concepts. The concepts were also similar to those of the Promostyl archive, featured in Figure 9.43, and dating back to the 1980s, illustrating once again that nothing is new in colour trends.

Figure 9-44. Gucci and Balmain A/W 2009/10 collections (Source: www.vogue.com)

The similarities between forecasted colours are apparent from the archive material examined, and comparisons with other colour information sources. The remarkable similarities support the views of Perna (1987), Brannon (2000) and Rinallo & Golfetto (2006) that forecasters are looking at the same information, are members of various colour committees and organisations developing colour, and thus share their collective colour understanding for the season in a variety of different ways. McKelvey & Munslow (2008:217) believe that trend forecasting has 'become a valuable means of analysis of this cyclical process', and certainly the indications are that there are some repetitions, if not quite clearly defined cycles of colour development in the fashion colour forecasting industry.

9.14 Summary

The examination of the archives corroborated Stansfield and Whitfield's 2005 findings that there are no set, predictable colour cycles which recur with any frequency. There are several colour trends running in parallel at any time. This disproves Brannon's 2000 model of cyclical colour change, and can be attributed to the advent of fast fashion since Brannon only examined colours up to 1992. It is clear that considerable changes occurred from the 1980's to the present day in both presentation and colour formats of commercial forecasting materials. Colours became increasingly sophisticated as the range of colours used by designers expanded, new fabrics with a range of different finishes and handles became available, and digital printing techniques developed. The colour palettes expanded, and seasonal updates were produced to deliver higher levels of accuracy and a value added service from the early 1990s onwards. The overall colour forecasting product became far more polished in its presentation as the fashion market became increasingly globalised. New markets emerged, notably in the Far East, necessitating a change in

approach to the language of the Promostyl trend book as Japanese was introduced as a third language. Publications became more user friendly, arguably more marketable, as the number of entrants into forecasting increased, naturally so did competition, none more challenging than the advent of internet communications, where 'just a click of a computer mouse links subscribers... enables them to view fashion, childrenswear or interior trends, or find information on what is happening in the youth market.' (Guerin, 2005: 40).

There were periods of dominance from specific colour groups, such as the greys and darks but it was difficult to fully corroborate Brannon's model of colour cycles (2000) with the findings from either archive. Some could be explained as being part of the regular core colour groups, greys and blacks for example, repeatedly experienced a dual role as both fashion and core colours. Writing in 2008, Li Edelkoort partially explained the phenomenon, referring to a colour referencing system, RAL, a 4-digit reference system, which has been an accepted format for colour definition for more than 70 years. The basic collection consists of more than 200 colours.

'The bestselling RAL color in history is reference #7035, a boring middle grey tone. Grey is the perfect fusion of black and white, the color of nuance and dialogue, and a metaphor for a mature and truly democratic lifestyle. The family of greys permits all other colors to lean against them, to underline or overshadow them. Grey is patient and flexible and an appeasing tone in times of change and financial crisis.'

Edelkoort (2008)

Oberascher (1994) and Brannon (2000) identified purple phases as important, yet the archive found true purples occurring in extremely limited quantities. Reds, purples and blues were closely related in some tonalities, so their repetition could be explained as being the morphing of a red through a pink phase to purple and vice versa interpreting the data in the broadest sense.

Indeed, toward the end of the sample surveyed, indications were that from 2000 onwards all possible colour permutations were represented in relatively equal amounts in the books, as previously suggested in Chapter 6, due to the evolution of the fast fashion culture, a response to the need to provide multiple seasons where previously there was only one. Forecasters demonstrated synergy in their colour palettes across the same season, and the chapter investigated why this is so. As discussed earlier, the same sources of information are often cited by the forecasters, which inevitably lead to the development of similar trends and colours. Polly Guerin, Professor of Fashion at the Fashion Institute of Technology in New York, suggests another potential reason for the multiplicity of colours.

'Colour palettes for the American market may differ from those for the international marketplace. Colour is based on light and New York City light, for example, reflects a brighter, more intense palette because of the enormous amount of sunlight. By contrast,

European cities have an overcast sky with less intensive light. This results in colours that are not as sharp'

(Guerin, 2005:48)

Promostyl and the other major European based colour forecasters, including Nelly Rodi and Peclers may be attempting to provide a broader range of colour suitable for a variety of international markets and clients outside the fashion and textile industries. It is evident that from the Autumn/Winter 2002/03 books incorporating Japanese text there was an expanding Japanese market; undoubtedly colour in Japan reacts differently to that in Europe, as Guerin (2005) suggests.

Colour updates published closer to the season, as with the Promostyl archive, can radically alter their original predictions made as much as a 12 to 18 months earlier, improving their accuracy. Some may perhaps regard this practice as unsustainable; why should any organisation invest in early colour information, only to see it change in a later update? Some companies work further ahead in the cycle, such as the yarn spinners or fabric manufacturers, therefore they require such advanced information. The update card may still contain some of the original colours, but those developing colour closer to the selling season may not require their colour information until far later in the cycle. Those organisations would benefit from updated information, whilst suppliers retain stock of greige or undyed yarn, which can be dyed to order far closer to the actual season. Mindful of fast fashion influences, this practice has been successfully adopted by many retailers for a proportion of their sales in recent years, and has not resulted in undue pressure on the supply chain.

For those who wish to plan ahead, be creative and fashion led, the colours predicted 18 month to two years in advance work well. Updates provide a further dimension to those developing product closer to the season, or allow other clients to update colour or concepts in their ranges. Ultimately, the information can be used however the client wishes it to be used, resulting in a more flexible approach to design and the creative process for a wide range of customers, as evidenced by the different start dates of colour development by both retailers in the longitudinal surveys, with one starting the process four months ahead of the other, as discussed in Chapter 7. How users apply information from the forecasters may subsequently affect its accuracy, but as no discernible colour cycles were identified, it would be impossible to develop trends by this method, as had been hoped.

10 Discussion and Conclusions

10.1 Discussion of Findings

The investigation aimed to establish how colour forecasts are compiled, to understand their influence within the fashion and textile industry, and to suggest methods for developing more accurate forecasts in the future. The research has identified these methods as:

a) utilising cyclical colour trends to predict new trends
b) adopting established, successful colour combinations and palettes from previous seasons
c) developing the full range of colour trend information far later in the timeline
d) deeper analysis of merchandise sell though based on colour.

If method c were to be adopted this could result in forecasts being issued between one year and 6 months ahead of the season, when forecasters currently publish their colour update cards, instead of the current 2 years to 18 months ahead as outlined in Fig. 9.29. Such measures could also empower current users of forecasting information to develop their own palettes without the need for such extensive colour forecasting information currently purchased by some organisations. Forecasters would still be needed to provide the indicative trends, in particular for fashion trends, but if users retained their own colour palette archive, they could reference these palettes without the need to purchase them directly from the forecasters. This would change the role of the forecaster but the industry would still be essential to provide creative inspiration to those organisations that require it.

As there was very little existing literature in the area of colour trend forecasting, the research provides a new contribution to knowledge by documenting the influences and range of decision making processes involved in commercial forecasting and those similar processes used by designers and retailers. The current literature is generally of a very subjective nature, with conflicting views regarding the accuracy of commercial colour forecasts, no in depth analysis of accuracy, and limited evidence of forecasters examining their past predictions for commercial accuracy.

It was established from the evidence base in Chapters 3 and 4 that the trend forecasting industry had developed almost by accident, in response to the closure of the Paris fashion houses during the First World War, and that it has subsequently developed in to an industry today estimated to be worth $36bn globally. The literature review revealed that although a considerable amount of literature was available regarding the fashion and textile industry in general, there was little regarding the development or use of colour

forecasting. Therefore much of the research was involved in the gathering of primary data, using qualitative data and employing a grounded approach to analyse the data gathered.

Fashion trend development theories such as those proposed by Veblen, Simmel, King and Field, were initially useful to establish how trends had been derived previously, trickling up, down or across through society as the traditional class divides blurred during the twentieth century. There was a distinct boom period within the forecasting industry in the 1970s and 1980s, with major forecasting companies such as Deryck Healy in the UK, Promostyl in France, and Here and There in the US becoming dominant players. As much garment and textile production moved offshore in the late 1980s and early 1990s, there was a sharp decline in the number of trend forecasting agencies worldwide as budgets were cut and trend development moved in-house. The few agencies that remained, such as Promostyl, Carlin, Peclers, and Here and There, established hegemony. From the 1990s the widespread adoption of fast fashion demanded highly responsive and adaptable fast moving product development. Fast fashion, widely acknowledged to have been pioneered by Spanish organization Inditex, owners of global fashion brand Zara, compressed the traditional fashion development period into a period of weeks rather than months, in quick response to newly emerging trends from the catwalk or other influential fashion sources.

New technologies, including web based production management systems, e-mail communications, online sources of trend information, mobile phone apps and fashion blogs have all contributed to the increasing the pace of fashion information communication. Many of these new online sources are free of charge, such as Trendstop, and have immediate, real time trends available for their clients. This leads to further pressure on the traditional trend forecasting industry, which had always developed colour forecasts on average two years in advance of the season and published them in the form of books. Trade Associations and other sources of free trend forecasting information previously provided their colour information free of charge too, but are finding it increasingly difficult to sustain a comprehensive service, publishing hard copy colour trend forecasts in the face of such cost effective digital competition.

Chapter 7 documented the longitudinal studies carried out with two major UK retailers: Retailer A between late 2004 to early spring 2007, with two subsequent follow up meetings in 2010: Retailer B between spring 2006 and spring 2007, with a follow up meeting in summer 2010. The evidence from both sources, plus the existing literature contributes new understanding of the development and use of colour trend forecasting material, and documents how its use has changed since the investigation began. To test any forecaster's claims of colour prediction accuracy, it was imperative to understand how retailers measured accuracy. This was usually as commercial success linked with their sell through sales figures and percentage markdowns according to Birtwistle et al 2006, Grant and Fernie (2008), Ekwall et al (2006) and Goworek (2001). This proved difficult to

establish as few retailers had published such data in the public domain, or were prepared to discuss their sales figures, or indeed their colour 'failures' during the interviews and longitudinal studies. The research identified basic products in core colours could expect a 95% full price sell through in comparison with potential errors leading to as much as 50% for fashion garments (Bruce and Daly, 2006). On average a very good sell through rate was classified between 70 – 80%, with the average before discounting being 30 – 40%. This was supported by evidence from the literature review, where experts from the retail industry stressed the importance of the right colour on the right product. Failures were categorised as colours which failed to sell in any substantial quantity at full price, and had to be substantially marked down, or even overdyed to change the colour prior to sale. However, some retailers appeared not to place significant emphasis on the colour as a selling factor; if this were addressed and closer examination of sell through rates in colour terms adopted, it would provide valuable information for future seasons. A colour palette database, highlighting colours which sold well and those which did not, would be a valuable resource to forecasters and feed into method c to ensure further accuracy in colour palette development.

The research established that colour forecasting is placed right at the beginning of both the supply chain and critical path as a starting point for design; several models of the supply chain supported this. It was also established that consideration of colour appeared several times within the retailers' critical path, as they worked through several iterations to develop the final colour palettes. Examples of these iterations can be seen within Figure 5.1, colour development timescales, and in Fig 7.2, the timescale for colour teams in retailers. As discussed in Chapter 7, where fast fashion was adopted, colour appeared later in the critical path too, as new colours were required for on trend, fast garments.

It became evident that designers and retailers worked each season with a group of core colours, comprising black, greys, whites, beiges and navy. These were repeatedly used in the forecasters colour palettes and sometimes even featured as 'fashion colours' in their own right. Brands working in high fashion or specialist niche markets such as Top Shop, Timberland and Shop Direct's occasion wear and plus size brands had established 'signature colours' which they would use each season, alongside the core and predicted fashion colours. It was important to identify how long each colour trend lasted and how it was adapted over a period of time, before it ultimately became unfashionable and unappealing to consumers, and was withdrawn; essentially the adoption of Rogers's 1985 diffusion of innovation curve applied to colours. This was explored in Chapter 7, where a number of different colour groups were identified as being present within any given season; core, or long term basic colours, long term fashion colours, and short term fashion colours. Establishing these basic parameters for colour lifecycles also helped in further understanding how colour cycles could be categorised within Chapters 8 and 9. The use of

core colours would also impact on the supply chain, fibre, yarn and fabric manufacturers, as they understandably ensured they produced a regular supply of core colour yarns, fabrics and garment components to meet the demands of the garment manufacturers and retailers.

Once the position of colour forecasting had been established within both the supply chain and critical path, one other major factor was investigated; the changing nature of retailing in the UK with the introduction of fast fashion principles. Fast fashion has become commonplace at many retailers in the UK, some attributing larger proportions of their business to it than others. It introduced a range of further challenges for the retailers and colour forecasters in terms of the rapidly accelerated colour development required, sometimes with only a matter of weeks between colour development and products delivered in store. Although there has been much written on fast fashion, there was little in relation to how colour trends were used when developing new merchandise in this manner. Therefore the research contributed to the existing knowledge base regarding the timing, or release of colour information and its numerous iterative positions in the critical path. Evidence from the longitudinal studies was compared with that of the retailer's interviews in Chapter 6. It emerged in Chapter 7, section 7.14, that the higher the fashion content of a brand, the less commercial colour forecasting information they required, as they generated much of their own, and indeed could be seen to even set the trends.

With increasing consumer price sensitivity, and the expansion of the 'value' (lowest priced) sector of the fashion industry in the last decade, price was often found to be a deciding factor when retailers were involved in product development. Ensuring the colours selected each season were seen to be on trend, and so sell well, was an essential driver behind the use of commercial forecast information. If the information could be relied upon to be more accurate, then margins could be improved, with fewer requirements for stock in a poor selling colour to be discounted or reprocessed and overdyed into another colour. As the mass market fashions at lower price points were found to rely more heavily on purchased colour forecasts than in house developed colour palettes in Chapter 7, such improved accuracy would obviously bring cost benefits to such retailers.

Identifiable colour cycles were cited by Brannon (2000) and were identified as a potential method for making colour forecasts more accurate. Evidence was used from Brannon and Stansfield and Whitfield's research into colour cycles in 2000 and 2005 respectively. This was found to be limited and so additional research was required using two colour archives, spanning over 25 years between them, one from Promostyl, and the other a combination of publications from Nelly Rodi and Peclers. Detailed examination of the archives was necessary both to establish any predictable patterns in colour trends, and also to indicate how colour forecasts are currently evolving based on historical evidence. The research conducted in Chapters 8 and 9 identified no colour cycles as such, but a repeated use of

specific colour combinations in palettes. This coupled with core colours, or a brand's signature colours, could provide a solid group of colour palettes for fibre yarn and fabric suppliers to work with early each season, and allow sufficient scope for designers and retailers to add their own nuances. All this could be compiled without the need for expensive commercial colour forecasting materials. However, no discernible colour cycles were identified which could be used to base predictions of future colour trends upon.

10.2 How Colour Forecasts are Compiled

From the primary research it was determined that trend forecasters do tend to use the same inspirational sources as each other, but each in a slightly different, individualistic manner, or with a particular and unique emphasis on specific areas. The key information sources determined from the research were:

- Catwalk trends
- Socio-economic trends
- Technological developments
- Lifestyle trends
- Cultural events, exhibitions, film, music.
- Historical information from previous seasons

Forecasters developing colour palettes employed a variety of diverse approaches to their developmental stages. This was often dependent on whether or not they worked as part of a team or independently, for a large organization or as a sole trader. Working within a large organisation required a distillation of concepts and colours, as evidenced by the colour committee meetings in Chapter 6, whereas an independent forecaster developed and adhered to their own concepts far more. Colour committees, such as those observed as a part of the study, are a common method of developing colour trends through a consensual and iterative process of distilling a final colour palette from a range of initial concepts and a large number of colours.

The major commercial forecasters offered revised and updated colour palette closer to the season, often between 6-12 months after their initial trend publications. In Chapter 9 it was revealed that at least 40% of colours are changed in such updates, indicating that new ideas and influential factors develop after commercial forecasts are first published, which can change the initial concepts considerably. This is significant as it proves forecasts developed two years in advance can never be entirely accurate as substantial revisions are later required.

The importance of intuition was revealed as a key contributing factor to colour palette development based on evidence from the existing literature, and the primary research, interviews with practitioners and retailers in Chapters 6 and 7. Prior knowledge and

experience of working with and creating colour palettes was a major factor influencing the forecasters' decisions. Intuition was used consciously or subconsciously, within the creative process, bringing experiences of previous colour palettes and combinations to the range of inspirational sources. Such intuition based on prior knowledge and experience was known as expert intuition

10.3 Contextualising Colour Forecasting Within the Supply Chain and Critical Path

The longitudinal studies with two major UK clothing retailers revealed fundamentally similar approaches to colour development within each organisation, dependent on their market sector. Their timings however, were different; Retailer A, a UK supermarket fashion 'value' brand, began their colour development four months earlier than Retailer B due their large global business, and the need to consult widely with a range of relevant groups during the development period. Brand identity was important to Retailer B, a major high street multiple with a strong high street identity, reputation for good quality products and customer age range from 0 – 90. Retailer B preferred to develop that through colour as well as garment style, purchasing far less commercial trend information than Retailer A in order to maintain a more independent trend development approach.

Retailer A also evidently experienced a far higher proportion of markdowns with their merchandise, other than their basic products in core colours, than Retailer B, yet used fast fashion principles extensively, and also employed more EPOS data analysis than Retailer B. One would predict the reverse to be true, but Retailer Bs success could be due to its strong brand, signature style and colours. They took more time to plan their merchandise in colour terms, how it would look in store as new merchandise appeared throughout the season, and the strong evidence of use of signature and core colours resulted in them using less 'high fashion' or short term fashion colours. This was obviously a key element to their success and an indication of the importance of colour in fashion business.

The closer to the mass market the retailers were, the more trend information they purchased and the less they generated themselves. From the longitudinal studies it emerged that Retailer A and B employed similar numbers of staff within their colour teams, but these were mainly technically focused at Retailer A, not design trained and therefore more creative, at Retailer B. This researcher hypothesised as resulting from a desire to rely more on commercial forecasters, as they were perceived as being more accurate and experienced than their own in house teams would be. This area of the mass market would benefit most from an improved method of developing accurate trends as they would be able to reduce their investment in trend publications and worked closer to the season, using signature colours and historically successful colour combinations.

Each retailer cited colours such as black, grey, navy, white and cream as being their core colours and an essential part of their overall business, used each season in basic products with up to a 95% sell through rate at full price. Other colours could be deemed to be core colours according to the season, such as bright red for Christmas party ranges, and core colours can also become fashion colours simultaneously, as shown in Chapter 9. The colour archive analysis in Chapter 9 indicated high fashion colours morph slowly over the seasons, brightening, darkening, greying or whitening, to become more established before being wholly replaced by new fashion colours.

The research revealed that there is still a place for a very early colour palette creation within the supply chain, particularly for fibre manufacturers, spinners and fabric mills, but within the retailers critical path there is more flexibility, as some high fashion content merchandise is bought closer to the season using fast fashion principles, thus they could support the proposed method c, where colour is produced far later in the timeline..

10.4 The Accuracy of Colour Forecasting Information

Both primary and secondary research indicates that colour predictions, developed up to two years in advance of the season, are indeed subject to change. Many of the major colour forecasting publishers issue colour updates closer to the season, and although such updates do contain some of the original colours, the evidence from the archives in Chapter 9 indicated they change considerably, from 40% up to 70%. Forecasters using online and digital formats are able to update their colour changes far faster, and so do not incur the potential problems of those forecasters who publish their trends in hard copy. Such online practices allow manufacturers and retailers to work according to their critical paths, which tend to be far closer to the season than the original published trend books, in particular when dealing with fast fashion models. Research indicated that sell through rates were significantly improved where fast fashion principles were used and product developed closer to the season (Ekwall et al, 2006, Bruce and Daly, 2006), but this did not appear to be the case at Retailer A, who used fast fashion, yet ironically started their colour development cycle four months earlier than Retailer B. The retailer was not working to fast fashion principles with colour, but mainly in a garment styling capacity. This coupled with the 'value' sector in which it operated indicated some interesting variable affected even fast fashion sell through, and that colour could not be disregarded, but has to be developed in tandem with the garment ranges if anticipated sell throughs are to be expected.

The suggestions for the rate of accuracy both from academic sources and industry professionals varies considerably, but many agree that in general colour forecasts are around 80% accurate, based on comments from the forecasters themselves from the

primary research (Holbrook, 2006, Nash, 2007, Raymond, 2011), and the extant literature (Brannon, 2000, Diane & Cassidy, 2005).

Brannon's colour cycle model from 2000 was based upon documented colour from 1972 to 1992, a period when colour and fashion trends moved far slower than today and before the widespread adoption of web based tools and technology and therefore cannot be said to hold true any longer. No discernible colour cycles were evident from the research, but what has been discovered is that in the contemporary fashion world many colour trends can work in parallel with one another, providing a wider choice for the consumer than ever, and an increased opportunity to sell merchandise. Moreover, cultural differences still prevail which require a slightly different colour approach, for example the brighter light found in America and Australia allows far brighter colour to be adopted than in northern Europe, where the light is not as clear, thus the UK colours will always have some differences to those developed for the American or Australian markets.

10.5 Improving the Accuracy of Future Colour Forecasts

It was hoped that the identification of predictable colour cycles from the examination of colour archives in Chapter 9 would offer some solution to the issue of how to develop more accurate forecasts. If regular colour cycles were identified, it would be far easier for those involved in the industry to prepare for them, requiring less colour palette development time, but this was not evident. However, it was obvious that more use could be made of past colour palettes and combinations when developing new colour palettes, as there were obvious groups of colours which worked harmoniously together, thus saving the retailer and designer time and money in subscribing to costly colour trend services. Retailers have increasingly developed their own forecasts by adopting the same inspirational sourcing methods, fast fashion principles and increased understanding of their customer base. Such factors provide a further challenge to trend forecasters in an increasingly competitive market. The evidence indicated that those retailers with strong signature colours, or at the high fashion end of the market, who developed the majority of their colours themselves and did not rely on commercial trends, would be the ones with the lower overall costs in colour development, a better knowledge of their core customer and markets, and likely to achieve more accurate results accordingly.

In conclusion, there are few apparent short cuts when it comes to developing colour trend forecasts, but intuition, sources of inspiration, specific brand identities, global location and the season itself can provide many clues as to what colours are going to be developed by the commercial forecasters. They will never be completely accurate, but with the increased use of digital formats, and the global adoption of fast fashion principles, we may be reaching a tipping point where the traditional hard copy formats require considerable review and redevelopment to keep pace with the fashion industry.

10.6 Final Conclusions

At the outset it had been expected that regular colour cycles would be identified, as some had already suggested. However, this was disproved through the primary research. It was interesting that most commentators suggested their forecasts were 80% accurate, yet only one actually kept records of their past forecasts, or compared their published colours with other colour sources, released closer to the season. Having worked within the colour forecasting sector for many years, the author thought herself familiar with the use of colour within the fashion and textiles industry, but it was interesting to find that some companies preferred to use their own in house teams to develop colour palettes. This coupled with the use of core and signature colours meant that much commercially forecasted colour was not used extensively within some brands.

What is clear is the increasing sophistication of colour forecasting materials during the 25 year span of the research, and that this will undoubtedly continue to improve. To summarise, the main conclusions from the research were:

1. Colour forecasting is situated at the beginning of the fashion and textiles supply chain as it is needed by fibre and yarn spinners and fabric manufacturers before fabrics can be manufactured.
2. Several iterations of colour forecasting are made within the fashion retail critical path as it is refined by buying, technical and design teams. It can be introduced again at a later stage if the company is introducing fast fashion merchandise.
3. Developmental methods of colour forecasting do not appear to have changed significantly within the last 25 years. The major change has come from the use of the internet, and the availability of immediate information from around the world which has enabled fast fashion principles to become widely adopted by many retail groups.
4. Key sources of inspiration remain as catwalk trends, socio=economic trends, technological developments, lifestyle trends, cultural events, music, theatre, film and the arts and historical information from previous seasons.
5. Colour palettes are often developed by committees so large numbers of colours are rationalised into four or five palettes.
6. Accuracy rates for commercial forecasts based largely on anecdotal information are approximately 80%, but as at least 40% of colours change with a colour update card closer to the season, it would be more cost effective to release just the revised forecast 12 months ahead of the season n future.
7. Sell through rates on core colours in basic garments are very high, up to 95%, basic fashion products should have a sell through of 85% but at a time when markdowns are increasing to over 33% some sell through rates are judged to be successful when only 30% at full price. A higher percentage of core colours would

help improve sales, with a more limited focus on fashion colours for fast fashion products.

8. When the forecasted information is utilised by designers and retailers, it changes to accommodate individual tastes, signature colours and brand identities. This can further effect the accuracy rate of the final colours used, generally said to improve it by the users of the information.
9. No discernible colour cycles could be established, but colour palettes and combinations that have proved successful in the company or also in other companies previously could be used to speed up the colour development process, or used at the beginning of the supply chain along with core colours.
10. Trend led and niche markets and brands know their customers well, and can either set the trends, or produce merchandise in colours they know their customer will buy to increase overall accuracy of their colour palettes.
11. Core and signature colours form the basis of any colour palette.

Finally, the widespread use of the principles in points 9 and 10, combined with a later publication of colour trends, between 6-12 months ahead of the season, would help to improve the currently accepted level of 80% colour accuracy rates. Sell though could be far higher and markdowns lower if more core and signature colours were used, and fast fashion principles adopted in relation to colour as well as garment style. The adoption of established colour combinations and palettes would aid in the drive for achieving higher levels of colour accuracy overall.

10.7 Limitations and barriers to Research

The research was limited in several areas. Firstly, much of the primary research was conducted in the UK, as outlined in Chapter 2, Research Methodology, and so did not fully consider the global market. It would be interesting to expand the research to other countries to assess how their colour forecasting development practices differ.

Secondly, the primary research focused on the high street retailers, and not the top end, designer market. This would be an interesting area to examine given the conclusion that a strong brand identity can indeed influence colour trends for the brand, as they often appear to retain strong signature colour palette.

Thirdly, few retailers or forecasters admitted to keeping records of their past colour failures or successes for more than a few seasons. It was difficult to gain any access to the information due to the sensitive nature of recent sales data. More historical data would understandably be less sensitive, yet still valuable to the researcher.

Finally the work was necessarily time limited; only covering a period of 25 years. The indications from the latter part of the research clearly suggest there is a considerable shift

in the world of trend forecasting, mainly due to the advent of online blogs, free mobile phone apps and a new generation of trend forecasters.

Future researchers into the industry would be encouraged to bear these factors in mind, and choose to expand on the work already presented.

10.8 Areas for Further Research

The landscape of trend forecasting is rapidly changing at a pace hitherto unseen and raising some interesting questions regarding the future viability of traditional hard copy trend forecasting formats. This is not contained within the scope of this thesis, but would provide interesting further research. The evidence has indicated the key players in the industry such as Peclers Paris, Promostyl, Carlin and Trend Union appear to remain in a position of strength, with long established reputations and a global customer base, developing an online presence in tandem with their physical publications, but it will be interesting to assess the position in another 10 years to determine whether or not online has usurped it. Current indications from the primary research indicates a combination of both may be the ultimate compromise, with users enjoying the immediacy of data online, but preferring to experience the tactile and visual qualities of fabrics and colours for themselves.

Forecasting publications are not currently in decline, but are threatened by the online format which is expanding significantly (Barnett, 2011). When the practitioner interviews started, the existing forecasters such as Carlin were keen to get involved in an online forecasting business, but none have developed the medium in the way in which WGSN or Stylesight have. Instead they have mainly produced a marketing tool with their websites. Mobile apps have become increasingly popular, for a very small fee in comparison with traditional forecasting subscriptions, and will undoubtedly continue. Such digital formats do raise questions regarding accurate colour communication, which requires a far more accurate solution than using today's current alpha-numeric colour referencing systems, such as Pantone or Scotdic, to indicate which colours are being referenced.

Many forecasters do not value their archives, or indeed retain them in either a physical or digital format. It is obviously costly to do so, requiring space and staff to catalogue the work. Additional research could be conducted with these publications, perhaps digitally archiving them to allow future researchers easier access to the information on line.

It would be interesting to persuade a forecaster, designer or retailer to adopt method c, to reduce the amount of time required to develop colour palettes in the future, but perhaps the clothing and textile industry is not yet quite ready for such radical solutions.

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12 Appendices

12.1 Appendix 1: Practitioner interviews conducted & basic questions asked

Name	Position	Date
Glenda Hansworth	Next, Senior Buyer	16.9.2005
Janet Holbrook	UK Agent, Peclers Paris	8.2.2006
George Davies	Founder, per una	18.5.2006
Marie-Christine Viannay	Em-Cee Designs	4.1.2007
Lynette Southall	UK Agent, Nelly Rodi	19.10.2006
Jackie Nash	Director, GCR/The Mix	23.03.2007
Russell Thorpe	Colour Director, Timberland Europe	21.5.2007
Alison Hughes	UK Agent, Carlin International	10.10.2007
Amelie Roberts	Colourist, Top Shop	10.10.2007
Sandy McLennan	Founder, East Central Studios	10.1.2008
Denise Ford	Colour consultant	15.2.2008
Joanna Bowring	Colour consultant	17.4.2008
Jane Kellock	Trends Analyst, WGSN	7.5.2008
Kate Bostock	Director, Marks & Spencer	14.5.2008
Ros Hibert	Consultant, Line	9.9.2008
Sian Edwards	Technical Manager ladies casualwear, colour and trend M&S	4.6.10
Martin Raymond	Owner, The Future Lab	27.1.11
Jane Barry	Ladieswear Designer, ShopDirect	21.2.11

12.1.1 Interview Questions

- What is your background and how long have you been involved in forecasting/design/retail? What is your role?

- How do you think forecasting/design/retail has evolved since you first started working in the area?
- What significance does colour forecasting have in the fashion industry, for example is it more important than fashion or fabric directions?
- How involved are you in the development of colour and trends for your organisation, are you the one who makes the final decisions for example?
- How many people work in the team with you and how are roles devolved?
- How far in advance of the season do you need to compile colour trends/publish your trends?
- What is the position of colour within the supply chain/critical path?
- What are the key stages in colour trend development for your organisation/yourself?
- What are the major influential factors you consider when developing colour forecasts/trends?
- Where do you gain your main sources of inspiration when developing colour palettes?
- Are you subject to specific constraints, e.g. financial, which might prevent you from looking at a different range of inspirational sources?
- How do you consider your different markets/consumers when developing your concepts?
- How accurate do you think colour forecasts are and what happens if your organisation gets the predictions/colours wrong?
- Do you keep records indication how accurate your forecasts were? If so, do you use these to build future forecasts on?
- How do you think colour forecasts could be made more accurate?
- Do you provide/receive seasonal colour updates?
- How do you see digital and online services impacting on your business, and specifically the colour trend aspect of it?
- What do you think the main drivers for the future of colour forecasting will be?
- Any additional information you would like to add which might be relevant?

12.2 Appendix 2: Profiles of Interviewees

Janet Holbrook from Peclers

Peclers is one of the largest and widely recognised forecasters in the world today, specialising in colour, indeed they refer to themselves as 'the leading international styling agency' in much of their promotional literature, and described their network of agents in their promotional publication 'Who is Peclers Paris?' as being:

'A global network of exclusive agents operating over four continents, a truly international observatory channelling non-stop information.'

Holbrook herself has been involved in forecasting for over thirty years since graduating from Camberwell College in Textile Design and believes that the Peclers book offer designers an interpretation and a creativity that other cannot.

Earlier examination of a Peclers colour archive, and their strong reputation for colour made it essential to interview Holbrook to contextualise some of the information gathered during the course of the research. The experience she had gained from working in forecasting, numerous one on one consultations with Peclers clients, comprising major retailers and brands, provided further knowledge of the operation of various UK retailers outside the longitudinal surveys. These qualities combined with her participation in the British Textile Colour Group committee, made Holbrook an obvious expert to interview from the forecaster's perspective.

Lynette Southall from Nelly Rodi

Lynette Southall has worked in forecasting for many decades, and represented the French forecasting agency, Nelly Rodi for over ten years. Southall has a similar background to Holbrook, in that she is a textiles graduate, specialising in knitwear design, and became interested in trend forecasting as a result of using the forecasting information personally as a designer. The organisation was formed in 1985 and the Nelly Rodi philosophy was outlined in their July 2006 Trends Newsletter:

'At Nelly Rodi we don't think that creativity is a choice, we believe it is a mission. The permanent questioning which the waltz of the trends imposes upon us, incites us to vary rhythms and change our way of thinking fashion and the development of new labels and new products.'

As the Nelly Rodi brand is a major, international forecasting name it was used in the study of a colour forecasting archive, therefore it was decided to select their UK representative, Lynette Southall, for interview to better understand the synergies and differences between a range of the key, established trend forecasters.

Jane Kellock from WGSN

WGSN has become a major force in trend forecasting since the launch of their online service almost twenty years ago. Arguably the best known and most successful of the online forecasters, they are based in London and have a network of global offices. Described by McKelvey & Munslow (2008:50) as the 'world's leading online trend analysis service', it was deemed vital for the purposes of the research to interview a senior representative from the organisation in order to establish whether or not their data gathering and synthesising was comparable to that of other terrestrial forecasting companies.

Jane Kellock had worked previously in forecasting within her trend development role with Topshop, working alongside the influential Jane Shepperdson who has often been credited with being one of the most astute design directors on the UK high street. As a freelance designer for Design Intelligence, the London based forecasting company who ceased trading in the early 1990's, Kellock worked more on the styling side of the trend books, before joining WGSN in 2001 as the kidswear editor. She has remained there ever since, and worked for five years on kidswear until the company was bought by Emap and restructuring took place. She then moved as Editor of Youth, Street and Sport, but recently took up her current role as she had found there 'was too much admin and not enough creativity' in the new role. Now she is in charge of a trends think tank and seasonal research, coordinating all the trend research within the group.

She was the ideal contact for the interview, as the driving force behind trend research within the organisation, with a thorough understanding of the skills used within trend research. Additionally, Kellock's background knowledge of the forecasting and retail industries allowed her to contextualise the links between the two, and answer many of the research questions. Her experience within the online forecasting business provided a unique perspective of the traditional and more contemporary forecasting methods and tools employed.

Alison Hughes from Carlin

Carlin is one of the longest established forecasting houses still working successfully today. Formed in 1947 by Monseiur Carlin, it is still based in Paris, but has agents worldwide. It had seen numerous changes in the development and process of trend forecasting since its inception, and as such, was an obvious company to interview given its longevity, with their agent being able to give a more detailed overview of the history of the company and its early beginnings.

Alison Hughes, at the time of the interview in 2007, was the UK agent and had worked in the trend industry for almost 10 years, prior to moving to Carlin four years previously. Her

previous experience working with clients had enabled her to understand how the retailers and trend providers worked together.

Hughes revealed that all of Carlin's trends, shapes and colours were derived from their research into consumer attitudes and emerging consumer groups, These were based around a number of issues such as politics, economics, lifestyle, environmental and cultural, and Carlin's international network of agents helped them to develop a global perspective. The company employed approximately 60 people in their Paris studios, comprising photographers, journalists, graphic designers, fashion and textile designers. Since the interview took place Hughes has moved to work with the US online trend forecaster Style Sight in the UK market.

Jackie Nash from The Mix & ex-ICA

Jackie Nash has been involved in the forecasting industry for over thirty years, and for most of that worked specifically with the colour trend sector, initially with The International Colour Authority (ICA), which was established in 1966. Her early involvement with the ICA made her an ideal candidate for interview, as she was able to explain the initial processes used in developing specific colour forecasts, and how the market changed over a period of rationalisation and increased overseas competition. There were also synergies between the two organisations and their developmental process for colour trends.

In 2000 she formed Global Colour Research (GCR), publishers of The Mix, specialist colour trend publications for fashion and interiors. The Mix presented a far more modern approach to colour forecasting, focusing on specific product areas such as sports and resort wear alongside the mens and womens colour predictions.

The company generated their own original photography, fabrics and styling, and the books also supplied small booklets of more portable colour. Jackie Nash's experience in the industry, involvement in the creation of original trend publications, and specialist in colour suggested she should be interviewed for the research. The interview provided valuable historical data, and participation in a colour development meeting for The Mix Fashion colour trend book. It allowed the process to be fully documented, answering a key objective – how colour forecasting is compiled and the synergy between sources.

Sandy McLennan, East Central Studios & Pantone Colour Book

Sandy McLennan's long involvement with the trend industry has been focused mainly around the knitwear sector, and developing colour specifically for that market. Before establishing East Central Studios in the 1980's, Sandy McLennan had worked for a variety of design companies in the London area, including Deryck Healey International where he developed forecasting skills through working on colour with the ground

breaking British agency. He established East Central Studios in the 1980's with partner Hilary Scarlett, and they were both members of the British Textile Colour Group.

In recent years he has worked in partnership with publisher David Shah, to develop the Pantone View colour book; meetings are held at EC Studios with a panel of colour and lifestyle experts, and McLennan coordinates the process.

The colour book is neither specifically aimed at fashion or interiors, but is more of an inspirational, lifestyle guide to colour and differs from many of the leading forecasters publications in this respect.

McLennan was selected as an interesting and essential interviewee who could provide many insights in to the development and use of colour trends and the early years of colour forecasting in the UK, and ini contemporary practice. His involvement with both the BTCG and the Pantone colour development panel made him ideal to answer many of the research questions, specifically regarding the key information sources for colour forecasters, how palettes are developed and what is information is used.

In addition to those directly involved in the development of colour trends and forecasts, a range of designers and colour users were also interviewed to again provide data for the research questions. Designers gave their perspective on how accurate colour information was perceived to be, what would happen if it was inaccurate as well as further contextualising its influences and place within the supply chain and critical path.

Amelie Roberts from Top Shop

Amelie's background comprises a degree in Printed Textiles from Chelsea College of Art & Design, and prior to joinong Topshop's design team eighteen months earlier; she worked for the designer Neisha Crossland. She only worked on the Topshop ranges, nothing else, but this covered ranges such as maternity, Unique and others. They develop their own trend and colour boards in which process Amelie played a key role, gathering and synthesising information, compiling colour palettes and developing themes concepts and prints. Given the considerable influence of TopShop on the UK high street, and its reputation as a design led brand, plus its use of fast fashion, it was thought imperative to interview someone of Amelie's standing within the company to ascertain how they used trend information, and indeed develop it themselves for such a cutting edge fashion brand. Amelie was able to contextualise how colour forecasting is compiled and the synergies between information sources at TopShop, compared with an independent designer brands such as Neisha Crossland.

Such an independent approach to colour trend development also assisted in establishing one of the key objectives, how colour forecasting is compiled, particularly within a retailer as opposed to a commercial forecaster.

Russell Thorpe from Timberland, Colour Director

Russell had worked for Timberland since 2002 as their Colour Director. He had experienced many changed during this time, mainly with the US apparel arm being disbanded. In the US the Timberland brand was viewed very differently to the European brand, as more practical, workwear rather than fashion oriented clothing. The outdoor performance wear design was still based in the US, but the International Design Centre (IDC) for Timberland was now based in Covent Garden, London, with other offices in Hong Kong at the time of the interview.

When Penny Aires was recruited from Gap to the European sourcing office around the same time as Russell in 2002, she saw that the overall colour development and control process was extremely poor. The designers responsible for developing colour painted swatches on paper with gouache, some designers worked with dyers to produce better colour standards, but the processes were vague and undisciplined and had led to some colour mistakes being made in terms of accuracy of colour within garment components and across the ranges. In the regional sourcing offices, such as Hong Kong, colours were sent out with vague Pantone references, so change was clearly required. The products were now designed and developed in the UK with five or six designers in London, but each regional sourcing office had a colour team in place.

As colour director for a global brand, less fashion driven than some, one which would not necessarily be associated with requiring accurate or fashion led colour trends, Thorpe was selected as an interviewee for the added dimension to the overall picture of the manner in which colour trends were used by a broader range of clothing brands and how colour could cause problems within a brand if not correctly managed, and establishing the place of colour forecasting within te supply chain and critical path.

Ros Hibbert, Line Consultants

Ros Hibbert graduated from London College of Fashion in the early 1970's with a Textile Institute qualification in clothing manufacturing with textiles. Her first role was developing colour forecasts for the Cotton Institute, now defunct. The forecasts were very prescriptive as there were not too many people doing trend prediction at the time, and it was mainly developed through the fibre associations, along with the Cotton Institute, the International Wool Secretariat and Irish Linen Guild, who also developed their own colour forecasts, much like many of the surviving trade associations, such as Cotton Incorporated in the US.

After several years experience, she then joined the US forecasting company IM International, where she developed both colour and textile forecasts. By the early 1980's she had joined British forecasting agency Design Intelligence, again working on colour and fabric trends, and after its closure in the mid 1990's moved on to work at Index, which

had been established by Alison Welsh and Lynette Cook in London. The Index forecasting company closed finally in 1998, which was when Hibbert started Line. She specialised in working on cotton and denim bases, but had also developed colour trends for domestic textiles and for automotive interiors. She worked with a variety of organisations, and also provided trends for the global online forecasting agency, WGSN and was a member of the BTCG.

Her extensive experience within forecasting, with a wide variety of different companies, and also particularly with WGSN, made her an ideal choice to interview from the numerous freelance trend experts available, able to provide an historical perspective on the industry and contribute greatly to the objectives of the research such as how it is compiled and the synergies between information sources, and the accuracy of forecasts.

Joanna Bowring, ex-Marks & Spencer

Joanna Bowring started her design career at Middlesex in Weave, and then moved onto the RCA for an MA in Textile Design, again mainly weave, but also print and knit. Upon graduating from the RCA, she joined the influential Deryck Healey Consultancy in 1975 where she was involved in developing trends. At the time, Deryck Healey had consultancy work and contracts with a number of high profile fibre companies, such as ICI, Du Pont and Montefibre. After four years of developing trends for the fibre manufacturers, she moved the Nigel French, another textile and colour trend company, who were starting a trend forecast publication in Japan called Prism Fabric.

Four years later she moved to Courtaulds Textiles as Design Director, where she worked for 13 years and ran the British Textile Colour Group as it gave her a chance to work so far ahead of the seasons. After 13 years she decided to give up her job at Courtaulds, and was subsequently asked by Sheelagh Brown, then Head of Womenswear at Marks and Spencer, to work freelance on fabric and colour trends three days a week. By 2000 she had joined Marks and Spencer as their full time Fabric Co-ordinator, developing the colours with a colour committee where the buyers had much more authority than the colourists, but she left after five years to take charge of the Texprint charity, which showcases young printed textile design talent from graduating students each year. She was still an active member of the BTCG, and was selected as she was able to provide historical perspective on the industry, the BTCG, the manufacturers and retailers application of colour forecasting within the supply chain and critical path, plus information on how forecasts are compiled and the synergies between information sources.

Marie-Christine Viannay, Em-Cee Designs

Marie-Christine Viannay started working in the forecasting industry in the 1980's with Nigel French, the UK based forecaster, the equivalent of Here & There in the US, whom Joanna Bowring had also worked for. Viannay was appointed to deliver factual

information on trends to the department stores as a menswear specialist. Nigel French had offices in both London and New York, and there was a marked two year colour cycle within the industry at that time. In order to gather the forecasting information, She travelled worldwide and although the trends were fairly broad during that period, and more simplistic that today's forecasts, she believed they were still well researched, and given to all sectors of the industry. This could include product design, plastics and automotive industries, so was not simply limited to fashion and textiles. To develop her colour trends she 'examined retail trends, nightclubs, catwalk shows and trade fairs.'

She had spent almost 30 years in the industry but was always rethinking grounds, new technology, market or customer changes, 'the message doesn't change vastly, circumstances change, there is a discipline and order dictated by clients, a seasonal pattern, and you have to work through the layers.'

At the time of the interview she was working with spinners whose customers were big brand designers, Chanel, Hermes, Louis Vuitton, who produced eight collections per season. Now working as a consultant she had seen how the market and ways of working had changed. The field of work she was involved in had narrowed to the spinners of high end, luxury cashmere yarns, and she no longer regarded herself as a forecaster, more a colourist for the textile industry. She developed fashion product colour ranges for the spinners and textile manufacturers and due to her experience with the very top end of the market was selected for her perspective on designers use of colour forecasting, as research had indicated many forecasters gain inspiration from the catwalk trends. If this was the case, where were the catwalk brands and high end designers gaining their inspiration from? Viannay helped to explain this, in that they looked at similar sources of inspiration, popular culture, the arts, technology and lifestyle changes, plus inspiration from earlier collections perhaps thirty or more years ago. Essentially these were the same sources as other interviewees had cited.

Denise Ford, ex-Courtaulds

Denise Ford graduated from Central St Martins in 1966 in printed textiles and began working as a freelancer almost immediately for Deryck Healey Associates; by Denise looked after the ICI menswear contract, which was a steep learning curve for her, entailing numerous courses in development .

She produced weekly designs and went to the US and ICI for meetings to discuss the design ideas with their in-house teams; at the time no other company was working internationally in this way in the UK, representing ICI worldwide at events working on knitwear and menswear to encourage the use of their fibres by the manufacturers of yarns and fabrics, producing colour cards or predictions of key trends for them to work from.

During this period, Deryck Healy Associates opened a series of offices in South Africa, Japan and the US. There were 75 people employed in London, with sections within the business that covered Interiors, Automotives, Surfaces and Graphics as well as fashion and textiles. For a short time they even developed their own clothing ranges, Playgame and Hamilton Cruise, in the late 1970's and early 1980's.

The markets began to change and Denise moved to ICI to go work with the mens and womenswear departments to set up an in-house studio. She developed an ICI signature range of colours and a range which the industry would understand, and gave slide presentations at the shows, as well as providing the customers with colour cards for the forthcoming seasons.

Eventually ICI was taken over by DuPont and Tactel was introduced as the key fibre. The colour cards she had developed when she started working full time for ICI were continued, but in a much more business-like approach, developed 24 months ahead of the season in order to communicate the full range of colours to the spinners, as the yarns needed to be ready 18 months in advance, the fabrics 12 months, and the garments 6 months in advance of the season in the mid 1980's. The initial period of developing the colours was the 'most interesting conceptual period, where there was time to think about things and develop colour ideas.'

They also provided a colour tab service for their customers, so they could send out small swatches of colour around the world to assist with colour matching. During this period she was also asked to join the Premiere Vision colour panel and to represent ICI/DuPont at the Premiere Vision colour meetings. She also joined the ICA on a freelance basis and represented them in China's emerging markets. After ICI had been taken over by Du Pont there was also an office in New York where she worked for a time.

She established her own consultancy business in 1996 working with WGSN, the online trend forecasting service, 'developing their early colours and surfaces which is quite conceptual and broad'. Perhaps of all those involved in the development of colour forecasting, Ford was the most significant, as she had worked in the industry for so many years, contributing tot he early forecasters work, such as Deryck Healy International, through to very different contemporary formats for WGSN. Her work with very early colour development for fibres whilst with ICI/Du Pont also lent a particular perspective to the accuracy of colour forecasts when compiled so far ahead of the season, thus she was able to contribute to the three research objectives, contextualising colour forecasting with in the supply chain and critical path, how colour forecasting is compiled and the synergies between information sources, and to a lesser extent, the accuracy of colour forecasts and how they can be improved.

Several buyers and retailers were also interviewed. Due to the detailed nature of the longitudinal surveys, a limited number of interviews with additional retailers were conducted.

Glenda Hansford, Buyer at Next

Glenda Hansford had been with Next in the buying office for several years, working her way up through the company to the position of senior buyer in womenswear when interviewed, although gaining experience in various departments throughout her career. She explained how trend books were purchased and used in her area, and how trend information was gathered by her and her team or purchased from commercial agencies and integrated into the colour development process. She has since left the company.

George Davies, founder Next, George & Per Una

When George Davies gave up his dentistry degree at Birmingham University in 1967 to join Littlewoods, he instinctively knew he had made the right move. Within a few days in charge of children's ankle socks he realised that the clothing industry was the one for him. From such an inauspicious start, he has gone on to become one of the UK's most influential retailers.

George realised that the key to success in the market was to know your customer. By 1972 he had started his own company, 'Schoolcare', a mail order school uniform business, fresh from Littlewoods. He learned quickly that retailers need to sell and to have vision.

These experiences were put into practice again, when George launched the radical retail concept 'Next' in Leicestershire after menswear retailer 'Hepworths' brought him in to overhaul its stores. George's vision for 'Next' sounded simple – colour block the merchandise, so the customer couldn't go wrong when selecting an outfit for themselves. Previously, most stores had adopted a scattergun approach to colour coordination and product placement. George was awarded the Guardian's Young Businessman of the Year in 1985 as a result of his concept for Next.

In 1990 his extraordinary vision once again launched another innovative clothing retail concept, 'George at Asda', with the Head Office once again in Leicestershire. We may now be familiar with seeing clothing on sale at a supermarket, but in 1990 it was revolutionary. For ten years George was at the helm, but decided to resign from the company after it was taken over by US retailer Wal-Mart. 'Per Una', launched in September 2001 was his fashion collection for the millennium. It sold in over 200 'Marks & Spencer' stores, and is widely credited with the resurgence of the UK's largest clothing retailer. The brand introduced 200 new styles each month ensuring customers return regularly to purchase.

He left Per Una in 2008 to establish a new clothing brand sold mainly online or within department store concessions. His undoubted success as a retailer, and high profile in the industry made him an exceptionally valuable commentator on trends.

Kate Bostock, Marks & Spencer

Kate Bostock was the Executive Director for Clothing at Marks & Spencer Plc, the first woman to be appointed to the Board of Directors, and credited with helping to turn around the fortunes of the UK's biggest clothing retailer.

Her early career was spent as a knitwear designer, her first two years were not spent designing, but learning about the processes involved in garment manufacture, the pattern cutting, hand flat knitting, yarn selection and performance and the making up. These skills stood her in good stead when one of the designers of the company went on maternity leave, and Kate stepped into the role. She progressed quickly with her own accounts, and was promoted to Head Designer and then Design Director, working all the time alongside buyers from a variety of different retailers. It was getting to know the buyers and their roles which led her to make a life changing decision – she decided to retrain as a buyer, moving to Leicester based Pippa Dee as a trainee buyer. After only three months she was appointed as a fully fledged buyer within the company after a further three years she became Head Buyer, and five years after joining the company became Buying Controller, remaining at Pippa Dee for six years.

She moved to Next as Head of Childrenswear and became Next's Childrenswear Director after just six months, leading them to the number one position in the UK childrenswear market soon afterwards, a position they retain to this day. It was the first time Kate had been involved in childrenswear, but it made a big impact on her and gave her a new product area to work with and learn about. Indeed, she firmly believes her number one strength is product, with a keen eye for the commercial and an instinct for design and colour.

Perhaps it was this blend of qualities which led her unexpectedly to George at Asda in 2001, following the departure of her friend George Davies. At George she suddenly had responsibility for all clothing product areas as Product Director responsible for a £2 billion turnover. Her vast experience and success in the product development and buying area provided high level feedback regarding the adoption and use of colour trend information in large UK high street retailers.

Sian Edwards, Technical manager ladies casualwear, colour & trend, Marks & Spencer

Sian Edwards has worked around the world for some of the biggest namesin sourcing and retailing. Her career has taken her from her first job with a shirt manufacturer in

Mauritius, to Sri Lanka, working for MAST Industries, and in Hong Kong for MAS and Burberry, then Victoria's Secret in New York. In the UK she has worked for Joules, Tu at Sainsbury's and now Marks and Spencer. She has experienced many different working practices around the world and so had considerable experience in many aspects of technical and design teams at varying market levels.

She had two different teams reporting to her at M&S, three creative colourists and three technical colourists, each team had a slightly different role to play with the creatives developing colour trends and directions, whilst the technical team worked on managing colour standards across the business, including homewares. The creative colour team provide trends for all the business units and the technical team try to match the colours provided by the creative team from the extensive library of MU&S colours, or have a new colour developed.

With ladies tops selling at 4 million pieces a week, it's a Major operation, and difficult to extract any meaningful colour data from the Range Planner system based on sales, as it only identifies a colour as being a red or blue, not a specific shade.

She is involved in the design briefing, meeting the design and buying teams and looking at trading figures too.

Martin Raymond, Co-Founder and Director, The Future Lab

Martin Raymond runs a well respected organisation called 'The Future Laboratory', a consumer-insight, brand-strategy agency, with clients including Louis Vuitton, BMW and American Express. This was founded over 10 years ago, and he is the editor of Viewpoint magazine.

He is a regular contributor on trends and business for the BBC, the BBC World Service programe Culture Shock, Channel 4 and ITV. Originally a journalist in the design and fashion area, he founded his first company, VideoGraphic, and later re-launched and edited UK trade magazine Fashion Weekly. He lectured for four years at London College of Fashion in fashion journalism and still teaches today at institutions such as the University of the Creative Arts and Nottingham Trent University.

The Future Lab is well respected worldwide, and Raymond has published two books to date, the most influential of which is arguably The Trend Forecasters Handbook.

Jane Barry, Ladieswear Designer, ShopDirect Group

Jane Barry graduated from London College of Fashion with a degree in Fashion Design Technology almost 8 years ago and has worked with ShopDirect ever since. She is responsible for several brands, which include Teatro, mainly occasion wear, Savoir for the older customer, and Love Label, for the younger consumer. All items are available in

a wide size range from 10 to 32 in the case of Savoir, so she has to be very careful when working with colour and pattern. She is also responsible for developing embroidery and other embellishments for the garments.

She has developed her knowledge of the larger size and older market over the years at ShopDirect, and carefully considers the implications of certain colours and colour combinations for these demographics. However, she has a far more fashion led remit for Love Label, which results in a very different colour palette, where she is able to use more fashion colours than basics, and believes that this is the role of a designer, to be versatile and understand the customer.

Additional Contributors

Some experts were unavailable for interviews in person, but nonetheless questions were submitted via e-mail. Not everyone responded as promised. However, a large amount of information was provided by Li Edelkoort. Including papers written for magazines and a profile of her and her business interests.

Independent forecaster, Anne Lise Kjaer also provided some interesting articles which she had submitted for publication. However, she was keen to stress that she was focused firmly on generic lifestyle trends, and had moved away from colour and fashion trends due to the rapid pace of change in the industry.

Appendix 3: Practitioner Interviews- open coding

First level Interviews	Second level	Evidence
Design Background	Textile design	MA Textile design from Camberwell College 30 yrs ago BA Printed Textiles Printed Textiles St Martins 1966 MA Textile Design @ RCA
	Fashion Design	BA Knitwear design Leics poly BA Knitwear Knitwear foundation course
	Garment/textile technology	Colour technology qualification Clothing manufacture with textiles
	Other	Artists model & fabric sales Publisher
Career background	Forecasting Design Retail Other	Nigel French, Deryck Healy & IM Deryck Healy, ICI, Du Pont ICA, The Mix

		Deryck Healy & East Central Studios
Definition of Colour Forecasting	Design development Marketing tool Convey Message	The market for trend prediction is expanding as it's applied to more disciplines than ever before. Colour forecasts used to take the risk out of the colour development stage
Time of initial palette development	Commercial forecaster	You have to have starting points; yarns & fabrics right at the beginning of the process. They have to start quite early Shoppers register colour, texture and shape first. From start of colour dev process to signing off printing to distributing the colours is 8 weeks Starts 24 months ahead of season for yarn spinners 2 years ahead of the season for fashion Work 2 years ahead of the season but have an ongoing evolution of macro trends. Working approx 12 months

		ahead of the season
	Print designer	Fibre co worked 2 years ahead as yarns needed to be ready 18 months ahead, fabrics 12 months ahead and garments 6 months
Sources of inspiration		Brainstorming session
		Designers on the catwalk push certain colours forward through their collections.
		Retail trends, nightclubs, catwalk shows and trade fairs
		Always looking at lifestyles
		Spinners produce graphs of sales figures for colours
		Used panel of colour experts to develop trends
		Team go to trend presentations, trade shows and buy trend books such as The Mix.
		Consumer research; they work with a no of brands

		advising on marketing campaigns. Travel internationally visiting trade shows, fashion shows, recording socio-cultural aspects including music, exhibitions artists and lifestyle trends Subscribe to Peclers & WGSN Tend to look at the major catwalk shows or occasionally from trade fairs Panel meets to discuss colours and decide what will go in the trend books Develops early and colours and surfaces which is quite conceptual & broad. Think tank & early colour meeting, perhaps 2 or 3 per season. Colour analysis fromall the trend books and sources to compare them Trend books, Li Edelkoort as a consultant, trade shows Used colour from catwalks – things began to blur as only 6 months ahead timimngs

		too tight
Intuition		I enjoy being intuitive and researching – looking at the world It is intuition first and you have to work with it then research. DO what fees right on an instinctive basis 20% intuition, 80% sales research Bring in intuitive colours I don't want to copy suggestions, I want to come up with my own ideas each season. You very much get a feel for it
Concious omissions	magazines	I don't read magazines for inspiration and would rather do something more original. Don't use many trend services or commercial forecasters ideas.

Influential factors	More competition	Industry consumer led & more competition on high street
	Client base	Long tern clients worked with her for 18-20 years
		Quick response allows new trends to emerge; celebrity trends & Grazia drive it
		Have to be very diverse as a designer now able to cope with change
		Different nationalities see colour differently
		French colours are different to UK
		French use 1 olour theme to permeate through their 4/5 colour stories
		British colours more adventurous
		Some colours work on specific products
Longevity of palettes		The starting point is to look back at previous seasons trends so the company is always progressing trends forward based on what has

		gone before. Nothing ever new simply a different slant on things They track colour trends & feature 3 seasons at back of their trend books Clients use their own signature colours each year Trends are no longer seasonal Mapping & tracking of trends in the books. Bring in new colours for freshness The company uses white, black and navy year on year. If buyers don't feel it's right, they carry over the palettes to the next season or change drops in store to reschedule trend. I can't just throw colours away, but instead move on in a very incremental way. Colours in fashion evolve and change very slowly, even today

		In 80's & 90s everyone threw them away at the end of each season and then started all over again so it was kept fresh Colours move at different speeds nowadays, green has been around for a long time, blue is in the ascendant but has been a long time coming
Accuracy		People want to know if it will sell, that's all In fashion & interiors about 80%- have always compared their palettes with trade show palettes
Future directions in forecasting		Technical developments at materials stage Big issue is books vs internet Colour can innovate through new transparents, metallics, pearlescents. Not viable to provide colour forecasting in the traditional way anymore. Developed an online trend service but not as popular as

		they had hoped Leading things will always come from the high end of the market Fibres leading development is over now with the major cut price Chinese mills – it hasn't translated well They will gain more from the fabric developments than from colour

Appendix 4: Meetings with Retailers during Longitudinal Studies

Retailer A Meetings

Meeting participants	**date**
Initial Meeting – Andrew, colour team technical manager, Tara, senior colourist, Sally senior colourist & Jo, design manager, womenswear	8.12.2004
2, meeting with Tara, senior colourist	1.2.2005
3. meeting with Sally, senior colourist & Jo, design manager, womenswear @ Premiere Vision, Paris	3.3.2005
4. Meeting with Sally, senior colourist	26.9.2005
5. Meeting with Nell, womenswear merchandise manager	13.12.2005
6. meeting with Sally, senior colourist	2.6.2006
7. Meeting with Sally, senior colourist	10.9.2006
8. Meeting with Sally, senior colourist & Nell, womenswear merchandise manager	14.3.2007
9.Meeting with Nell, womenswear merchandise manager	25.8.10
10. Meeting with David, Merchandise Manager	25.8.10

Retailer B Meetings

Initial Meeting, William, senior colourist	3.3.2006
2. meeting with William, senior colourist	26.7.2006
3. meeting with William, senior colourist	19.10.2006
4. meeting with William, senior colourist	1.12.2006
5. meeting with William, senior colourist	16.2.2007
6. Meeting with William, senior colourist	9.6.10

Appendix 5: Open coding analysis from retailers longitudinal studies

The Business Case

Retailer A	Retailer B
Reduce no of lab dips	Reduce no of lab dips – cost £800 each & spent over £350k on them for A/W 2006/07 season
Rationalise no of new colours developed each season	• Reduce number of new colours required by using extensive in house library of over 50,000 colours • Pressure to reuse popular colours year on year as a business decision, not design led.
Colours produced in US	Colours produced in far east
Provide design teams with a booklet on seasonal trends & styling concepts for global teams.	Produce small colour books with colour chips for design & buying teams.
Expanding design & technical teams	Design teams expanding after a period of status quo.
Design pack produced each season& phase for sourcing & supply chains to standardise colours, sizing & labelling.	The colour books produced for the design and buying teams are also given to a small number of supplier, although they are notorious for sharing information, so not too many are distributed.
QA major issue for colour	QA important – need to have matching colours across product areas.
Suppliers purchase packs	The colour books produced for the design and buying teams are also given to a small number of supplier, although they are notorious for sharing information, so not too many are distributed.
Books copied to 20 global teams who use 70% of colours from them & 30% from own	Comp shopping budget £30k, trend book budget £10k.

markets.	
June 2006 Prices being driven down but trend content rising	July 2006 Menswear & boyswear amalgamated in may 2006, economies of scale.
2 new technical appointments to menswear team shadowing jerseywear buyers	
Korean Office closed	
Colour palette confirmation timed to fall week before design teams inspirational shopping trips.	Colour palette confirmation taking place earlier and not so many changes allowed, except for a few key fashion colours.
	Developmental budget increased in recent years, especially after merging with boys. More money for trend books and overseas trips
	October 2006 A very fast season this year in colour development.
	Stopped going to forecasters trends presentations etc.

Colour Development Strategies

Retailer A	**Retailer B**
Dec 2004 Developing 5 stories and using accent colours to add to core colours	March 2006 Work on 4 main menswear brands plus essentials, shirts, socks & underwear.
Girlswear uses more core colours	For S/S 2007 16 initial colour trends filtered down to 12 key ones.
Mens uses more fashion colours than core	Trend boards & colours scanned in & compiled by CAD team into A4 format.
300 new colours selected in S/S 2006 by all categories	Initially up to 30 colours for each story.
Sept 2005	Technical aspects of colour important, ensuring colour matches across a range of

Compiling 14 trend boards initially	fibres & products.
Mens & boys worked together using own inspirational pics – 27 core colours plus 10 – 15 fashion colours per phase	Stories & colours are reduced by consensus to 2 per brand per season, reviewed by design teams to ensure they sit well together
Womenswear identified 14 important colour directions	Reduction in colour palette developed through the amalgamation of similar tonal colours in to 1. Usually end up with around 14 colours, not including core colours.
Womens more complex than mens, eg. Selected 7 new fashion reds. Took longer to develop palettes & selected more fashion cols than any other area	Colours matched through in house library & lab dips – each lab dip costs £800 so kept to min (previous season over £350k spend on lab dips)
• Menswear took 1 day to select colours • Girls and intimate apparel took one day to select cols • Boyswear core colour palette same as previous year but added 3 greys • Womenswear took longest to develop	Pressure to reuse successful colours season after season
150 colours selected for A/W 2006/07	July 2006 Starting colours for A/W 07/08
June 2006 Colour & trend team hold 3 sessions with design managers and their teams, April, may & June to assist in colour development	Closed week is 11.9.06 the week before the teams start travelling & when ideas are compiled & presented, using trends emerging from books, & other sources.
Later presentations will be more realistic 2 way communications	Boyswear merged with menswear in May 2006, so now developing their colours for sleepwear, active etc.
March 2007 Mens & Womens colour boards now distinctly separate	Colour development more structured now and earlier than before, Colours now quite fixed, not so many changes allowed
Early trend direction card developed for design teams – groups cols into 12 ranges & indicates direction of cols, on way in, up or out	Only colour changes allowed are for new fashion colours but only used as highlights.
Col standards adopted for core colours in boys & ladies nightwear with small no of core cols.	M&S customers about 1 year behind fashion trends & core colours sell well.

Girlswear has 72 core colours but is being reduced, as does Ladieswear.	Some colours held back until Xmas if they are seen as more suitable for the party season.
Producing less one colour garments such as polo shirts, do not sell well; easier to introduce colour into stripes etc.	October 2006 Trend overview for menswear team took place 12th Sept 2006 comprising 7 focused stories, reduced from 11 in previous season.
	Limiting range of colours available to design teams to speed up colour selection
	In house colour books published October matching their colour standards & sent to far east for production
	Totally new colours this season, only neutrals & naturals progressing with grey, black & white still important.
	Menswear colours don't change as radically as womenswear which are seen as schizophrenic.
	Each brand has 5 colours & 5 palettes per brand
	• Transitional palettes July/Aug • Autumn launch in September • Dec has Xmas update
	PV very womenswear based & too late for the trends, too predictable.

Colour information sources

Retailer A	Retailer B	
In house library of over 1600 colours	In house library of over 50,000 colour chips	
Trend books (Dec 2004) • Trend Union • Peclers • Promostyl Kids • Nelly Rodi • Carlin Lingerie	Trend Books (March 2006) • Trend Union • Peclers • Nelly Rodi • Carlin	

• MRK Lifestyle • WGSN Added in Feb 2005 • Walk in Footwear • Carlin Colours Added in Sept 2005 • Dcipher • A+A • The Mix	• The Mix • Dcipher • Chiron Added in July 2006 • The Mix Interiors • Monthly shopping report from NYC – mainly street pics Added in October 2006 • Ready Made • Stopped using Nelly Rodi • Stopped using The Mix	
Trade fairs visited • Premiere Vision • Tissu Premiere	Trade fairs visited March/July 2006 • Premiere Vision • Moda In • Pitti Filati • Pitti Bimbo Trade fairs visited Oct 2006 • Stopped using Premiere Vision	
Design teams travel to fashion capitals for inspiration, Paris, Milan, NYC etc.	Travels to NYC, Paris & LA for inspiration. July 2006 Increasing travel budget; in 2004 only 5 staff travelled, now 25 visiting NYC out of 200 in menswear team. October 2006 Visiting new places, Stockholm & Milan	

Sept 2005 Men & Boys teams worked together using own street shots for inspiration.	Womenswear now travelling to Miami and St Tropez for inspiration. Around 600 in womenswear team.	
End 2005 New trend team established in London to provide additional lifestyle info.	Used a cool hunter in the past but it didn't work well- just 1 person's opinion.	
June 2006 Trend team involved in the presentations of lifestyle concepts to design teams in July 2006 *for A/W 07* season.		
March 2007 Colour developments strongly linked to lifestyle trends due to trend team input.		
Col team now developing own 'early trend direction card' for staff to use.		
Trend books • The Mix stopped publishing, so not used • More selection from Carlin, Peclers & Promostyl.	October 2006 • Stopped using forecasters one on one presentations.	

Working Practices

Retailer A	Retailer B

Trying to increase pace of colour development but menswear used more fashion than core colours.	Menswear slower pace of change
14 concept boards developed initially with 4 key favourite directions identified	16 initial trend ideas reduced to 12
• Iconic fashion colour selected to work with 27core colours, colours supplemented with 10 – 15 fashion colours for each phase • Reduced number of new colours used from 300 to approx 150 in one season	Maybe 30 colours for each brand initially
Working with trend team on lifestyles	Work with CAD team to develop electronic imagery
Colour team compile all trend & colour books for design & buying teams	Colourist writes about the colours, describing them & their evolution for the design & buying teams.
Colours are an amalgamation of trend book colours, or sometimes selected from just one book by a particular team	Trend book colours not taken literally from the books
Travel to fashion capitals for inspiration	Travelling with brand team for inspirations & directions
4 customer profiles & 4 lifestyles used to develop the concepts & set the scene.	Stories reduced to 2 per brand per season. Usually 14 new colours in each, not including core colours.
Started producing early Trend Direction card showing the direction of key colours as they move through the product lifecycle	Fast fashion separate to seasonal colour palettes & usually 10 week turnaround from concept to product.
Starting to look at why particular colours sold well and others did not	More ideas coming from shopping trips and new cities being added such as Stockholm.
	Tried using cool hunter but it didn't work well.
	Intuition and experience are main aspects of colour development.

	Has to keep the colours in line with the company image
	Each colour team works independently, so noone talks to anyone else.
	Reducing initial number of colour stories presented each season – down from 11 stories previous season to 7.
	Not fashion led organisation , about 1 year behind in colour terms.
	Each brand has 5 new fashion colours per season, with 5 palettes per brands showing the transitions.
	Forecasters who publish books are usually too late for them now.
	Premiere Vision too late and also too womenswear focused.